

FINANCIAL DISCLOSER

CASE NO.: _____

BRANCH: _____

 (Your Attorney)

Your Name _____
 Address _____

 DOB _____
 Employer _____
 Occupation _____
 Date of Marriage _____

 (Other Party's Attorney)

Date of Separation _____

Please list your children and their dates of birth:

Children	Birthdate

1. STATEMENT OF INCOME

TAX INFORMATION

Last year's federal tax refund:	Husband/ father	\$ _____
	Wife/ mother	\$ _____
	Joint	\$ _____
Last year's state tax refund:	Husband/ father	\$ _____
	Wife/ mother	\$ _____
	Joint	\$ _____

MONTHLY INCOME

Your monthly gross income from salary, commissions, allowances, and overtime. (Note: To arrive at monthly income, multiply weekly income by 52 and divide by 12; multiply bi-weekly income by 26 and divide by 12)	\$ _____
Pensions and retirements	\$ _____
Social Security benefits	\$ _____
Disability and/or Unemployment Compensation Benefits	\$ _____
Public assistance (i.e., welfare, W-2 payments, food stamps, daycare subsidy)	\$ _____
Prior court-ordered support received	\$ _____

Dividends and interest	\$ _____
Rents received	\$ _____
*Bonuses (annual, semi-annual or quarterly)	\$ _____
All other sources	\$ _____
TOTAL MONTHLY INCOME	\$ _____

DEDUCTIONS FROM YOUR GROSS MONTHLY INCOME

Number of tax exemptions claimed for payroll deductions:	Husband/ father _____
	Wife/ mother _____
Federal income taxes	\$ _____
State income taxes	\$ _____
Social security and Medicare	\$ _____
Medical insurance	\$ _____
Other insurance - dental, long term health insurance	\$ _____
Support paid by payroll deduction	\$ _____
Union or other dues	\$ _____
Retirement or pension fund	\$ _____
Savings plan	\$ _____
Credit union, debt repayment	\$ _____
Other (specify):	\$ _____
TOTAL MONTHLY DEDUCTIONS	\$ _____
NET MONTHLY INCOME (aka TAKE HOME PAY ; subtract deductions from the monthly income)	\$ _____
GROSS MONTHLY INCOME OF OTHER HOUSEHOLD ADULT MEMBERS	\$ _____

2. STATEMENT OF MONTHLY ESTIMATED EXPENSES

Specify the number of members in each household whose expenses are included. List their names and relationships. # _____

Relationship	Name
Husband	
Wife	

MONTHLY ESTIMATED EXPENSES

Rent or mortgage payments, principal, interest, taxes, insurance (if in one payment)	\$ _____
Real estate taxes and insurance (Insurance \$ _____ / year ; Taxes \$ _____ / year)	Annual \$ _____
Repairs/ maintenance of residence, appliances, furnishings, garbage pick-up	\$ _____
Food (include work/ school lunches, household supplies, tobacco, wine and spirits)	\$ _____
Electricity and gas	\$ _____
Heat	\$ _____

Water	\$ _____
Telephone, cable, internet	\$ _____
Laundry/ dry cleaning	\$ _____
Clothing and shoes	\$ _____
Medical/ drug expenses not covered by insurance	\$ _____
Dental expenses not covered by insurance	\$ _____
Insurance (life, health, accident, comprehensive, liability, disability - exclude payroll deductions)	\$ _____
Childcare (including babysitting/ daycare)	\$ _____
Prior court ordered child support payments	\$ _____
School (both child/ adult education, lessons)	\$ _____
Entertainment (clubs, social obligations, travel, vacations, camp, recreation, hobbies)	\$ _____
Incidentals (grooming, gifts, holiday gifts, birthday, donations)	\$ _____
Transportation, auto expenses (gas, oil, repair, parking, auto insurance, etc.)	\$ _____
Vehicle payments	\$ _____
Newspapers, periodicals, books	\$ _____
Memberships (associations, clubs, religious organizations)	\$ _____
Care/ maintenance of pets	\$ _____
Payments for support of dependents not living at home (not included above)	\$ _____
Installment payments/ debt payments	\$ _____
Other expenses:	\$ _____
TOTAL ESTIMATED MONTHLY EXPENSES	\$ _____

3. DEBITS AND OBLIGATIONS (Attach schedule if necessary)

Creditor's Name	For	Balance	Monthly Payment
		\$ _____	\$ _____
		\$ _____	\$ _____
		\$ _____	\$ _____
		\$ _____	\$ _____
		\$ _____	\$ _____
		\$ _____	\$ _____

4. STATEMENT OF ASSETS

All property of the parties known to be owned individually or jointly; indicate who holds title or how title is held, (M) Man, (W) Woman, (J) Jointly, or (C) for the benefit of the Children. Further, if there are any assets owned by either party prior to the marriage or inherited or received as a gift prior to or during the course of the marriage, also identify the asset or assets as follows: (P) Prior to the marriage, (I) Inherited, (G) Gifted. For example: property gifted to man (G-M). If insufficient space, insert total and attach schedule.

Prior to marriage, inherited, or gifted (P, I, or G)	Who holds the title (M, W, J, or C)	Asset

A. REAL ESTATE (If more real estate is owned, attach with same information for all additional properties.)

Type of property: _____	Original cost:	\$ _____
Address: _____ _____	Cost of additions:	\$ _____
	Total cost	\$ _____
Date of purchase: _____	Mortgage balance:	\$ _____
Current market value: \$ _____	Other liens:	\$ _____
Basis/ date of valuation: _____	Equity:	\$ _____
Monthly payment: \$ _____	Taxes (Previous tax year than current year):	\$ _____

B. PROFIT SHARING / PENSION / RETIREMENT ACCOUNTS (Include deferred compensation plan, Keogh plan and IRA accounts, employee stock option plans, stock options)

Name of account	Amount
	\$ _____
	\$ _____
	\$ _____

C. CASH AND DEPOSIT ACCOUNTS (Include all accounts at banks, savings & loans, credit unions, savings, checking, and certificates of deposit)

Date	Name of Institution	Type of Account	Holder	Balance
				\$ _____
				\$ _____
				\$ _____
				\$ _____

D. STOCKS AND BONDS

Date	Number of shares	Name of Company/ Issuer	Value
			\$ _____
			\$ _____
			\$ _____
			\$ _____

E. AUTOMOBILES

Year	Make	Current Value	Amount of Lien	Net Value
		\$ _____	\$ _____	\$ _____

		\$ _____	\$ _____	\$ _____
		\$ _____	\$ _____	\$ _____

F. MEDICAL, CASUALTY, DISABILITY, OTHR INSURANCE (not paid through unemployment)

Name of company	Policy Number	Group number	Type

G. LIFE INSURANCE

Name of company	Beneficiary	Face Amount	Surrender Value
		\$ _____	\$ _____
		\$ _____	\$ _____
		\$ _____	\$ _____

H. BUSINESS INTEREST (Indicate name)

Name	Share	Type of Business	Value Less Indebtedness
			\$ _____
			\$ _____

I. OTHER PERSONAL PROPERTY AND ASSETS (Value exceeds \$1000 - i.e., antiques, heirlooms, china, furs, silver, art objects, coin collections, boats, snowmobiles, guns, etc.)

J. DISPOSED ASSETS Have you disposed of any assets within the one-year period prior to the filing of the petition for divorce, the proceeds of which are not already accounted for in the above representation of assets?

No

Yes (If yes, describe the asset, date of transfer, to whom transferred and the value received, if any)

Date of Transfer	Asset	Whom transferred	Value Received
			\$ _____
			\$ _____

K. GIFTS OR INHERITANCES List and describe any property valued over \$500 that you acquired as inheritance or gift (not from your spouse), including when and how acquired, fair market value at time acquired and at present, and how much such property is currently held.

When acquired	Type of property	How acquired	How property is currently held	Fair Market Value when acquired	Fair Market Value now
				\$ _____	\$ _____
				\$ _____	\$ _____
				\$ _____	\$ _____

L. PROPERTY OWNED PRIOR TO MARRIAGE List and describe any property valued over \$500 and not acquired by gift or inheritance that you owned prior to the marriage, including fair market value at time of marriage and present, and how the property is currently held.

Type of property	How acquired	How property is currently held	Fair Market Value when acquired	Fair Market Value now
			\$ _____	\$ _____
			\$ _____	\$ _____
			\$ _____	\$ _____

M. Are you a party of any other lawsuits?

No <input type="checkbox"/>
Yes <input type="checkbox"/> (If yes, provide details: attach separate sheet if necessary)

N. Have you ever filed bankruptcy?

No <input type="checkbox"/>
Yes <input type="checkbox"/> (If yes, provide details: attach separate sheet if necessary)

Failure by either party to timely file a complete disclosure statement shall authorize the court to accept the statement of the other party as accurate.

I declare, under penalty of perjury, that the foregoing, including any attachments, is true and correct and that this declaration was executed on this _____ day of _____, 20__.

X _____