

Financial Data Entry Sheet for Family Law Software

Name of Party Filing in This Form: _____

Husband's name: _____

Wife's name: _____

I. FAMILY DATA

Husband's birth date: _____

Husband's place of birth: _____

Husband's Social Security number: _____

Wife's birth date: _____

Wife's place of birth: _____

Wife's Social Security number: _____

Date married: _____

Place married (city, county, state): _____

Date separated or divorced: _____

Children of marriage:

Child Name	Birth Date
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Minor Children of a prior marriage:

Child Name	Birth Date	Custody (Husband/Wife/Joint)	Tax Exemption (Husband/Wife/Neither)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Is marital residence occupied by Husband Wife Both

Husband's present address

Wife's present address

Husband's occupation: _____
Wife's occupation: _____

Husband's Employer's name: _____
Husband's Employer's address: _____

Wife's Employer's Name _____
Wife's Employer address: _____

Education, training & skills:

Husband's health

Wife's health

Children's health

II. MONTHLY EXPENSES: (enter each expense weekly OR monthly OR annually)

Housing and Utilities are entered for each residence. Enter the address along with expenses.

RESIDENCE #1: Address _____

HOUSING:	Weekly	Monthly	Annually
1. Rent	\$ _____	\$ _____	\$ _____
2. Mortgage [Enter mortgage with Assets, below]	----	----	----
3. Real Estate Taxes	\$ _____	\$ _____	\$ _____
4. Condominium Charges	\$ _____	\$ _____	\$ _____
5. Cooperative Apartment Maintenance	\$ _____	\$ _____	\$ _____

UTILITIES:	Weekly	Monthly	Annually
1. Fuel oil	\$ _____	\$ _____	\$ _____
2. Gas	\$ _____	\$ _____	\$ _____
3. Electricity	\$ _____	\$ _____	\$ _____
4. Telephone	\$ _____	\$ _____	\$ _____
5. Water	\$ _____	\$ _____	\$ _____
6. Other (describe)	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____

RESIDENCE #2: Address _____

HOUSING:	Weekly	Monthly	Annually
1. Rent	\$ _____	\$ _____	\$ _____
2. Mortgage [Enter mortgage with Assets, below]	----	----	----
3. Real Estate Taxes	\$ _____	\$ _____	\$ _____
4. Condominium Charges	\$ _____	\$ _____	\$ _____
5. Cooperative Apartment Maintenance	\$ _____	\$ _____	\$ _____

UTILITIES:	Weekly	Monthly	Annually
1. Fuel oil	\$ _____	\$ _____	\$ _____
2. Gas	\$ _____	\$ _____	\$ _____
3. Electricity	\$ _____	\$ _____	\$ _____
4. Telephone	\$ _____	\$ _____	\$ _____
5. Water	\$ _____	\$ _____	\$ _____
6. Other (describe)	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____

RESIDENCE #3: Address _____

HOUSING:	Weekly	Monthly	Annually
1. Rent	\$ _____	\$ _____	\$ _____
2. Mortgage [Enter mortgage with Assets, below]	----	----	----
3. Real Estate Taxes	\$ _____	\$ _____	\$ _____
4. Condominium Charges	\$ _____	\$ _____	\$ _____
5. Cooperative Apartment Maintenance	\$ _____	\$ _____	\$ _____

UTILITIES:	Weekly	Monthly	Annually
1. Fuel oil	\$ _____	\$ _____	\$ _____
2. Gas	\$ _____	\$ _____	\$ _____
3. Electricity	\$ _____	\$ _____	\$ _____
4. Telephone	\$ _____	\$ _____	\$ _____
5. Water	\$ _____	\$ _____	\$ _____
6. Other (describe)	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____

RESIDENCE #4: Address _____

HOUSING:	Weekly	Monthly	Annually
1. Rent	\$ _____	\$ _____	\$ _____
2. Mortgage [Enter mortgage with Assets, below]	----	----	----
3. Real Estate Taxes	\$ _____	\$ _____	\$ _____
4. Condominium Charges	\$ _____	\$ _____	\$ _____
5. Cooperative Apartment Maintenance	\$ _____	\$ _____	\$ _____

UTILITIES:	Weekly	Monthly	Annually
1. Fuel oil	\$ _____	\$ _____	\$ _____
2. Gas	\$ _____	\$ _____	\$ _____
3. Electricity	\$ _____	\$ _____	\$ _____
4. Telephone	\$ _____	\$ _____	\$ _____
5. Water	\$ _____	\$ _____	\$ _____
6. Other (describe)	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____

RESIDENCE #5: Address _____

HOUSING:	Weekly	Monthly	Annually
1. Rent	\$ _____	\$ _____	\$ _____
2. Mortgage [Enter mortgage with Assets, below]	----	----	----
3. Real Estate Taxes	\$ _____	\$ _____	\$ _____
4. Condominium Charges	\$ _____	\$ _____	\$ _____
5. Cooperative Apartment Maintenance	\$ _____	\$ _____	\$ _____

UTILITIES:	Weekly	Monthly	Annually
1. Fuel oil	\$ _____	\$ _____	\$ _____
2. Gas	\$ _____	\$ _____	\$ _____
3. Electricity	\$ _____	\$ _____	\$ _____
4. Telephone	\$ _____	\$ _____	\$ _____
5. Water	\$ _____	\$ _____	\$ _____
6. Other (describe)	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____

RESIDENCE #6: Address _____

HOUSING:	Weekly	Monthly	Annually
1. Rent	\$ _____	\$ _____	\$ _____
2. Mortgage [Enter mortgage with Assets, below]	----	----	----
3. Real Estate Taxes	\$ _____	\$ _____	\$ _____
4. Condominium Charges	\$ _____	\$ _____	\$ _____
5. Cooperative Apartment Maintenance	\$ _____	\$ _____	\$ _____

UTILITIES:	Weekly	Monthly	Annually
1. Fuel oil	\$ _____	\$ _____	\$ _____
2. Gas	\$ _____	\$ _____	\$ _____
3. Electricity	\$ _____	\$ _____	\$ _____
4. Telephone	\$ _____	\$ _____	\$ _____
5. Water	\$ _____	\$ _____	\$ _____
6. Other (describe)	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____

FOOD:	Weekly	Monthly	Annually
1. Groceries	\$	\$	\$
2. School lunches	\$	\$	\$
3. Lunches at work	\$	\$	\$
4. Dining Out	\$	\$	\$
5. Liquor / alcohol	\$	\$	\$
6. Home entertainment	\$	\$	\$
7. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

CLOTHING:	Weekly	Monthly	Annually
1. Husband	\$	\$	\$
2. Wife	\$	\$	\$
3. Children	\$	\$	\$
4. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

LAUNDRY:	Weekly	Monthly	Annually
1. Laundry at home	\$	\$	\$
2. Dry cleaning	\$	\$	\$
3. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

INSURANCE:	Weekly	Monthly	Annually
1. Life [Enter life insurance payments with policies]	----	----	----
2. Homeowner's / tenant's	\$	\$	\$
3. Fire, theft & liability	\$	\$	\$
4. Automotive	\$	\$	\$
5. Umbrella policy	\$	\$	\$
6. Medical plan	\$	\$	\$
7. Dental plan	\$	\$	\$
8. Optical plan	\$	\$	\$
9. Disability	\$	\$	\$
10. Worker's compensation	\$	\$	\$
11. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

UNREIMBURSED MEDICAL:	Weekly	Monthly	Annually
1. Medical	\$	\$	\$
2. Dental	\$	\$	\$
3. Optical	\$	\$	\$
4. Pharmaceutical	\$	\$	\$
5. Surgical nursing, hospital	\$	\$	\$
6. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

HOUSEHOLD MAINTENANCE:	Weekly	Monthly	Annually
1. Repairs	\$	\$	\$
2. Furniture, furnishings, housewares	\$	\$	\$
3. Cleaning supplies	\$	\$	\$
4. Appliances including maintenance	\$	\$	\$
5. Painting	\$	\$	\$
6. Sanitation / carting	\$	\$	\$
7. Gardening, landscaping	\$	\$	\$
8. Snow removal	\$	\$	\$
9. Exterminator	\$	\$	\$
10. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

HOUSEHOLD HELP:	Weekly	Monthly	Annually
1. Babysitter	\$	\$	\$
2. Domestic (housekeeper, maid, etc.)	\$	\$	\$
3. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

AUTOMOTIVE (list data for each car separately):	Weekly	Monthly	Annually
Vehicle #1. <input type="checkbox"/> Personal <input type="checkbox"/> Business			
1. Payments	\$	\$	\$
2. Gas & oil	\$	\$	\$
3. Repairs	\$	\$	\$
4. Car wash	\$	\$	\$
5. Registration / license	\$	\$	\$
6. Parking	\$	\$	\$
7. Tolls	\$	\$	\$
Vehicle #2. <input type="checkbox"/> Personal <input type="checkbox"/> Business			
1. Payments	\$	\$	\$
2. Gas & oil	\$	\$	\$
3. Repairs	\$	\$	\$
4. Car wash	\$	\$	\$
5. Registration / license	\$	\$	\$
6. Parking	\$	\$	\$
7. Tolls	\$	\$	\$
Vehicle #3. <input type="checkbox"/> Personal <input type="checkbox"/> Business			
1. Payments	\$	\$	\$
2. Gas & oil	\$	\$	\$
3. Repairs	\$	\$	\$
4. Car wash	\$	\$	\$
5. Registration / license	\$	\$	\$
6. Parking	\$	\$	\$
7. Tolls	\$	\$	\$
Vehicle #4. <input type="checkbox"/> Personal <input type="checkbox"/> Business			
1. Payments	\$	\$	\$
2. Gas & oil	\$	\$	\$
3. Repairs	\$	\$	\$
4. Car wash	\$	\$	\$
5. Registration / license	\$	\$	\$
6. Parking	\$	\$	\$
7. Tolls	\$	\$	\$
Other Automotive (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

EDUCATIONAL:	Weekly	Monthly	Annually
1. Nursery / pre-school (describe)	\$	\$	\$
	\$	\$	\$
2. Primary and secondary (describe)	\$	\$	\$
	\$	\$	\$
3. College (describe)	\$	\$	\$
	\$	\$	\$
4. Post-graduate (describe)	\$	\$	\$
	\$	\$	\$
5. Religious instruction	\$	\$	\$
6. School transportation	\$	\$	\$
7. School supplies / books	\$	\$	\$
8. Tutoring	\$	\$	\$
9. School events	\$	\$	\$
10. Other (describe)	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

RECREATIONAL:	Weekly	Monthly	Annually
1. Summer camp	\$	\$	\$
2. Vacations	\$	\$	\$
3. Movies	\$	\$	\$
4. Theatre, ballet etc.	\$	\$	\$
5. Video rentals	\$	\$	\$
6. Tapes, CD's, etc.	\$	\$	\$
7. Cable TV	\$	\$	\$
8. Team sports	\$	\$	\$
9. Country club / pool club	\$	\$	\$
10. Health club	\$	\$	\$
11. Sporting goods	\$	\$	\$
12. Hobbies	\$	\$	\$
13. Music / dance lessons	\$	\$	\$
14. Sports lessons	\$	\$	\$
15. Birthday parties	\$	\$	\$
16. Other	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$

INCOME TAXES:	Weekly	Monthly	Annually
1. Federal	\$	\$	\$
2. State	\$	\$	\$
3. City	\$	\$	\$
4. Social Security and Medicare	\$	\$	\$

	Annual Income
Real estate (income only), per year.	
	\$
	\$
	\$
Trust & annuities, per year.	
	\$
	\$
	\$
Pension (income only), per year.	
	\$
	\$
IRA 401k income, per year.	
	\$
	\$
	\$

	Annual Income
Awards, prizes, grants <input type="checkbox"/> Taxable	\$
Bequests, legacies & gifts	\$
Alimony from prior marriage	\$
Child support from prior marriage	\$
Income from all other sources (describe)	\$
	\$
	\$
	\$

Tax preference items per year.	Annual Income
1. Long term capital gain deduction.	\$
2. Depreciation, amortization or depletion.	\$
3. Stock options: excess of fair market value over amount paid.	\$

If any child or other member of your household is employed enter the name & person's annual income.	

IV. ASSETS: (If any asset is held jointly with spouse or another, so state and set forth your respective shares.) **ADD ADDITIONAL SHEETS IF NEEDED**

Cash Accounts, Checking, Savings, Securities Bonds, Notes, Mortgages

1. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

2. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

3. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

Cash Accounts, Checking, Savings, Securities Bonds, Notes, Mortgages (cont.)

4. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

5. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

6. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

Cash Accounts, Checking, Savings, Securities Bonds, Notes, Mortgages (cont.)

7. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

8. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

9. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

Cash Accounts, Checking, Savings, Securities Bonds, Notes, Mortgages (cont.)

10. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

11. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

12. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

Cash Accounts, Checking, Savings, Securities Bonds, Notes, Mortgages (cont.)

13. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

14. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

15. Financial Institution: _____

Account number: _____
Title holder: _____
Date opened or acquired: _____
Source of funds: _____
Original price or value: \$ _____
Balance or Current Value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____
Type of account: Cash Checking Money Market Savings Credit Union
 Brokerage Acct Escrow Investment Acct Bond Note CD Savings Bond
 Bond Fund Tax Exempt Tax Refund Stock Stock Option Mutual Fund
 Brokerage Margin Acct

Loans to Others and Accounts Receivable

1. Debtor's name & address: _____

Description: _____

Original amount of loan: \$ _____

Funds source/Debt Origin: _____

Date payment due: _____

Current amount due: \$ _____

Current value: \$ _____

Husband's separate amount: \$ _____

Wife's separate amount: \$ _____

2. Debtor's name & address: _____

Description: _____

Original amount of loan: \$ _____

Funds source/Debt Origin: _____

Date payment due: _____

Current amount due: \$ _____

Current value: \$ _____

Husband's separate amount: \$ _____

Wife's separate amount: \$ _____

3. Debtor's name & address: _____

Description: _____

Original amount of loan: \$ _____

Funds source/Debt Origin: _____

Date payment due: _____

Current amount due: \$ _____

Current value: \$ _____

Husband's separate amount: \$ _____

Wife's separate amount: \$ _____

Value of Interest in any Business

1. Name & address: _____

Type of business: _____

Your capital contribution: \$ _____
Your % of interest: _____ %
Date of acquisition: _____
Original price or value: \$ _____
Source of funds _____
Method of valuation: _____
Annual Cash Flow: \$ _____
Other information: _____
Current net worth: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

2. Name & address: _____

Type of business: _____

Your capital contribution: \$ _____
Your % of interest: _____ %
Date of acquisition: _____
Original price or value: \$ _____
Source of funds _____
Method of valuation: _____
Annual Cash Flow: \$ _____
Other information: _____
Current net worth: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

3. Name & address: _____

Type of business: _____

Your capital contribution: \$ _____
Your % of interest: _____ %
Date of acquisition: _____
Original price or value: \$ _____
Source of funds _____
Method of valuation: _____
Annual Cash Flow: \$ _____
Other information: _____
Current net worth: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Cash Surrender Value of Life Insurance

1. Insurer's name & address: _____

Name of insured: _____

Policy number: _____
Face amount of policy: \$ _____
Policy owner: _____
Date of acquisition: _____
Funding source to acquire: _____
Current surrender value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

2. Insurer's name & address: _____

Name of insured: _____

Policy number: _____
Face amount of policy: \$ _____
Policy owner: _____
Date of acquisition: _____
Funding source to acquire: _____
Current surrender value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

3. Insurer's name & address: _____

Name of insured: _____

Policy number: _____
Face amount of policy: \$ _____
Policy owner: _____
Date of acquisition: _____
Funding source to acquire: _____
Current surrender value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Vehicles (automobile, boat, plane, truck, camper, etc.)

1. Description: _____
Make: _____
Model: _____
Year: _____
Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
Current lien unpaid: \$ _____
Current fair mrkt. value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

2. Description: _____
Make: _____
Model: _____
Year: _____
Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
Current lien unpaid: \$ _____
Current fair mrkt. value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

3. Description: _____
Make: _____
Model: _____
Year: _____
Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
Current lien unpaid: \$ _____
Current fair mrkt. value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

4. Description: _____
Make: _____
Model: _____
Year: _____
Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
Current lien unpaid: \$ _____
Current fair mrkt. value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Real Estate (including real property, leaseholds, life estates, etc. at market value.)

1. Description: _____

Title owner: _____

Date of acquisition: _____

Original price: \$ _____

Source of funds: _____

1st mortgage current balance \$ _____

Monthly payment \$ _____

2nd mortgage current balance \$ _____

Monthly payment \$ _____

Est. current mrkt. value: \$ _____

Husband's separate amount: \$ _____

Wife's separate amount: \$ _____

2. Description: _____

Title owner: _____

Date of acquisition: _____

Original price: \$ _____

Source of funds: _____

1st mortgage current balance \$ _____

Monthly payment \$ _____

2nd mortgage current balance \$ _____

Monthly payment \$ _____

Est. current mrkt. value: \$ _____

Husband's separate amount: \$ _____

Wife's separate amount: \$ _____

3. Description: _____

Title owner: _____

Date of acquisition: _____

Original price: \$ _____

Source of funds: _____

1st mortgage current balance \$ _____

Monthly payment \$ _____

2nd mortgage current balance \$ _____

Monthly payment \$ _____

Est. current mrkt. value: \$ _____

Husband's separate amount: \$ _____

Wife's separate amount: \$ _____

Real Estate (cont.)

4. Description: _____

Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
1st mortgage current balance \$ _____
Monthly payment \$ _____
2nd mortgage current balance \$ _____
Monthly payment \$ _____
Est. current mrkt. value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

5. Description: _____

Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
1st mortgage current balance \$ _____
Monthly payment \$ _____
2nd mortgage current balance \$ _____
Monthly payment \$ _____
Est. current mrkt. value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

6. Description: _____

Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
1st mortgage current balance \$ _____
Monthly payment \$ _____
2nd mortgage current balance \$ _____
Monthly payment \$ _____
Est. current mrkt. value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

IRA, 401(k), Pension and Vested Interest in Trusts

1. Description: _____

Location of assets: _____

Title owner: _____
Date of acquisition: _____
Original investment: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

2. Description: _____

Location of assets: _____

Title owner: _____
Date of acquisition: _____
Original investment: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

3. Description: _____

Location of assets: _____

Title owner: _____
Date of acquisition: _____
Original investment: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Contingent Interests (stock options, interest subject to life estates, prospective inheritances)

1. Description: _____
Location: _____
Date of vesting: _____
Title owner: _____
Date of acquisition: _____
Original price: \$ _____
Source of funds: _____
Method of valuation: _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Household Furnishing

1. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

2. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

3. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

4. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

5. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Household Furnishing (cont.)

6. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

7. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

8. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

9. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

10. Description: _____
Location: _____
Title owner: _____
Original price \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Jewelry, Art, Paintings, Prints, Antiques, Precious Objects, Gold and Precious Metals
(only if valued at more than \$500)

1. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

2. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

3. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

4. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

5. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Jewelry, Art, Paintings, Prints, Antiques, Precious Objects, Gold & Precious Metals (cont.)

6. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

7. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

8. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

9. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

10. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Other Assets (e.g. tax shelter investments, collections, judgments, causes of action, patents, trademarks, copyrights, and any other assets not hereinabove specified)

1. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

2. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

3. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

4. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

5. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

Other Assets (cont.)

6. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

7. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

8. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

9. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

10. Description: _____
Location: _____
Title owner: _____
Original price: \$ _____
Source of funds: _____
Unpaid lien amount: \$ _____
Current value: \$ _____
Husband's separate amount: \$ _____
Wife's separate amount: \$ _____

V. LIABILITIES: (If jointly with spouse or another, so state, and state your share)

Notes, Accounts Payable, Credit Card, Car Loan ...

1. Description: _____
Creditor / Broker name & address: _____
Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

2. Description: _____
Creditor / Broker name & address: _____
Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

3. Description: _____
Creditor / Broker name & address: _____
Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

Notes, Accounts Payable, Credit Card, Car Loan (cont.)

4. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

5. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

6. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

Notes, Accounts Payable, Credit Card, Car Loan (cont.)

7. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

8. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

9. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

Notes, Accounts Payable, Credit Card, Car Loan (cont.)

10. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

11. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

12. Description: _____

Creditor / Broker name & address: _____

Debtor: _____
Amount of original debt: \$ _____
Date of incurring debt: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
Type of Liability:
 Accounts Payable Note Payable
 Car Loan Credit Card Bank Loan Personal Loan
 Brokers' Margin Accounts

Mortgages Payable on Real Estate

1. Mortgagee (lender): _____
Address of property: _____
Mortgagor(s): _____
Original amount: \$ _____
Date of incurring debt: _____
Maturity date: _____

2. Mortgagee (lender): _____
Address of property: _____
Mortgagor(s): _____
Original amount: \$ _____
Date of incurring debt: _____
Maturity date: _____

3. Mortgagee (lender): _____
Address of property: _____
Mortgagor(s): _____
Original amount: \$ _____
Date of incurring debt: _____
Maturity date: _____

4. Mortgagee (lender): _____
Address of property: _____
Mortgagor(s): _____
Original amount: \$ _____
Date of incurring debt: _____
Maturity date: _____

5. Mortgagee (lender): _____
Address of property: _____
Mortgagor(s): _____
Original amount: \$ _____
Date of incurring debt: _____
Maturity date: _____

6. Mortgagee (lender): _____
Address of property: _____
Mortgagor(s): _____
Original amount: \$ _____
Date of incurring debt: _____
Maturity date: _____

F. Taxes Payable

1. Description of tax: _____
Amount of tax: \$ _____
Debtor: _____
Date due: _____
 Husband's separate debt Wife's separate debt

2. Description of tax: _____
Amount of tax: \$ _____
Debtor: _____
Date due: _____
 Husband's separate debt Wife's separate debt

3. Description of tax: _____
Amount of tax: \$ _____
Debtor: _____
Date due: _____
 Husband's separate debt Wife's separate debt

G. Loans on Life Insurance Policies

1. Description: _____
Insurer name & address: _____
Amount of loan: \$ _____
Date incurred: _____
Purpose: _____
Name of borrower: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt

2. Description: _____
Insurer name & address: _____
Date incurred: _____
Purpose: _____
Name of borrower: _____
Amount of loan: \$ _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt

H. Other Liabilities

1. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt

2. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____ Percent of loan paid by you: _____ %
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt

3. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____ Percent of loan paid by you: _____ %
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt

4. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____ Percent of loan paid by you: _____ %
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt

H. Other Liabilities (cont.)

5. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____ Percent of loan paid by you: _____ %
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
6. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____ Percent of loan paid by you: _____ %
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
7. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____ Percent of loan paid by you: _____ %
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt
8. Description: _____
Creditor name & address: _____
Debtor: _____
Original amount of debt: \$ _____
Date incurred: _____
Purpose: _____
Monthly payment: \$ _____ Percent of loan paid by you: _____ %
Amount of current debt: \$ _____
 Husband's separate debt Wife's separate debt

