

**Rita Ros-Planas
Divorce Mediator
Attorney and Counselor at Law**

FINANCIAL INFORMATION

The financial information called for on the following pages is important. If you need help in completing any item, please let your mediator know.

Estimate the value of each of the following items of property. If any item is located in a jurisdiction other than that in which you live, indicate where such item is located, and, if necessary, give details on a separate sheet. Indicate how much of each asset held in joint ownership was contributed by husband and how much by wife. Attach copies of Federal Income Tax Returns for last three calendar years and copies of all financial statements furnished banks or other creditors during the same period

ASSETS

	<u>Husband</u>	<u>Wife</u>	<u>Marital (or joint)</u>
A. Bank Accounts and Savings Accounts:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
B. Notes, Accounts Receivable (i.e. money owed to you. Indicate by whom payable, amount, and date or dates payable):			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
C. Stocks, Bonds, Mutual Funds:			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Husband Wife Marital
(or joint)

D. Real Estate (Home and other):

E. Life Insurance --- (Name of Company, Policy Number, face value, type (i.e., "term," Ordinary life," etc.) and location of policy:

F. Business or Professional Interests (Please furnish last balance sheet and P & L statement, tax return, buy-sell agreements, etc.):

G. Miscellaneous Property (Patents, trademarks, copyrights, royalties, employee benefits (please furnish last statement and descriptive booklet), stock options, pensions, etc.

Husband Wife Marital
(or joint)

H. Personal Effects, Automobile,
Tangible Personal Property:
(May need attachment)

LIABILITIES

OWED BY

A. Mortgages on Real Estate:

Husband Wife Marital

B. Notes Payable to Banks and Others:

C. Loans on Insurance Policies:

OWED BY

Husband Wife Marital
(or joint)

D. Other Debts:

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Total Liabilities:

_____	_____	_____
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Net Worth (Assets minus Liabilities):

_____	_____	_____
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Total Liabilities and Net Worth:

_____	_____	_____
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ANNUAL INCOME

Husband Wife

Gross Salary

_____	_____
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Less:
Withholding

(_____)	(_____)
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FICA

(_____)	(_____)
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Other deductions (Itemize):

_____	(_____)	(_____)
_____	(_____)	(_____)
_____	(_____)	(_____)
_____	(_____)	(_____)

Net Salary

_____	_____
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Dividend Income*

_____	_____
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	<u>Husband</u>	<u>Wife</u>
Interest Income*	_____	_____
Income from Trusts*	_____	_____
Rental Income*	_____	_____
Other Income (specify)*		
_____	_____	_____
_____	_____	_____
_____	_____	_____
Anticipated Support Payments	_____	_____
Total Annual Income	_____	_____
Less deductions for:		
Estimated Taxes	(_____)	(_____)
Self-Employment Taxes	(_____)	(_____)
Other Deductions for Tax Payments on Income		
Not Subject to Withholding	(_____)	(_____)
Total Deductions	(_____)	(_____)
Net Annual (take home) Income	_____	_____
Average Monthly Net (take home) Income (1/12th of Annual Figure)	_____	_____

*If this income is received jointly, so indicate () and divide between husband and wife.