

**FINANCIAL INFORMATION AND INCOME STATEMENT**

**NAME :**

**DATE:**

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

Please bring copies of this information for everyone in the mediation, along with documentation for the items on the sheet (I.e., bank statements, appraisals, etc.). Please also bring copies of Federal and State Income Tax returns for the past three years and W-2 forms or copies of your pay stubs. You do not need to notarize this statement until it is in final form. In addition, please look at your credit reports at [www.annualcreditreport.com](http://www.annualcreditreport.com) to see what joint credit you still may have outstanding.

**ASSETS**

Enter the value of each of the following items of property as precisely as you can. Also identify the property as precisely as possible, including account numbers, names of banks, etc. List according to the name the property is titled under.

**A. Real Estate (Home and Other):**

	<i>Amount</i>	<i>Title Spouse A /Spouse B /Joint</i>

Subtotal

**B. Bank Accounts and Savings Accounts**


\$0.00

**C. Notes, Accounts, (I.e., money owed to you. Indicate by whom**

payable, amount, and date or dates payable. Include money owed by other spouse).

	<i>Amount</i>	<i>Spouse A Spouse B Joint</i>

\$0.00

**D. Stocks, Bonds, Mutual Funds:**


\$0.00

**E. Life Insurance - Name of Company, Policy Number, Face Value, Type (I.e., "term," "Ordinary life", etc.) And location of policy:**


\$0.00

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


\$0.00

**G. Miscellaneous Assets - Patents, Trademarks,  
Copyrights, Royalties, Stock Options,**

**Frequent Flyer Miles, Credit Card Points,  
Etc.**

*Spouse  
A/Spouse  
B Joint*

<i>Amount</i>		

\$0.00

**H. Pension Plans, SEP's, 401(k)s, IRA's or Profit-sharing Plans,  
(Please furnish last statement and descriptive booklet):**

*after tax  
values (.8)*



\$0.00

\$0.00

**I. Personal Effects, Automobiles, Tangible Personal Property  
(valued at \$500 or more):**



\$0.00

**TOTAL ASSETS**

**\$0.00**

**LIABILITIES**

**A. Mortgages on Real Estate:**

	<i>Amount</i>	<i>Spouse A/Spouse B Joint</i>
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\$0.00

**B. Notes Payable to Banks and Others:**


\$0.00

**C. Loans on Insurance Policies:**


\$0.00

**D. Other Debts (including store charges, credit cards and debts to other spouse):**


\$0.00

**TOTAL LIABILITIES**

<b>\$0.00</b>
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TOTAL ASSETS MINUS LIABILITIES

\$0.00

ANNUAL INCOME

	Spouse A	Spouse B	Joint
Gross Salary			
Net Salary (income minus taxes and FICA)			
Dividend Income			
Interest Income			
Income from Trusts			
Rental Income			
Other Income			
<b>TOTALS</b>	\$0.00	\$0.00	\$0.00

Please have this form notarized when the information is complete.

The above information is true and complete to the best of my knowledge and belief.

\_\_\_\_\_  
Signature                      Date

\_\_\_\_\_  
Signature                      Date

Subscribed and sworn to me before this  
\_\_\_\_\_  
Day of \_\_\_\_\_, \_\_\_\_\_

Subscribed and sworn to me before this  
\_\_\_\_\_  
Day of \_\_\_\_\_, \_\_\_\_\_

\_\_\_\_\_  
Notary Signature

\_\_\_\_\_  
Notary Signature

\_\_\_\_\_  
My Commission Expires

\_\_\_\_\_  
My Commission Expires

## MONTHLY BUDGET OF EXPENSES

Name \_\_\_\_\_

How to use this form: In this budget, we work with *monthly* units. Please translate all items (e.g. weekly allowances, semi-annual insurance, etc.) into average monthly units.

**Please fill out only for yourself. Spaces for your spouse are left for you to fill out at our next meeting.**

This budget is meant to reflect your best estimate of your anticipated expenses. It is not meant simply to list your past expenses. Instead, use your past experience (average phone bills, etc.) as the basis to establish a budget for the next six months, after separation. This is meant to be a planning document so as to have a more realistic and concrete sense of your future needs and lifestyle.

**Please make enough copies of your budget to bring to the mediation meeting for everyone.**

A. Housing	Spouse A	Children	Spouse B
1. Rent			
2. Mortgage (Principal and Interest)			
3. Equity Loan/Line of Credit			
4. Real Estate Taxes			
5. Home Insurance			
6. Other (Specify)			
<b>SUBTOTAL</b>			

B. Utilities	Spouse A	Children	Spouse B
1. Electricity			
2. Gas/Heating Oil			
3. Telephone/Cell			
4. Water			
5. Other (Specify)			
<b>SUBTOTAL</b>			

**C. Household Operation and Maintenance**

**Spouse A**

**Children**

**Spouse B**

1. Repairs (normal/ongoing)
2. Appliance Service Contracts
3. Garden & Yard Work
4. Domestic Help (\_\_\_ days at \$ \_\_\_ per day)
5. Cable TV/Internet
6. Other (Specify)

	Spouse A	Children	Spouse B
<b>SUBTOTAL</b>			

**D. Food (home & away)**

**Spouse A**

**Children**

**Spouse B**

**SUBTOTAL**

	Spouse A	Children	Spouse B

**E. Clothing**

**Spouse A**

**Children**

**Spouse B**

**SUBTOTAL**

	Spouse A	Children	Spouse B

**F. Transportation**

**Spouse A**

**Children**

**Spouse B**

1. Gas and Oil
2. Auto Repair & Maintenance
3. Auto Licenses & Stickers
4. Auto Insurance (mo. average)
5. Auto Installment Payments
6. Other (bus, taxi, parking, etc.)

	Spouse A	Children	Spouse B





**J. Personal and Entertainment**

**Expenses**

1. Drug/Variety Store Items			
2. Books, Magazines, Newspapers			
3. Dry Cleaning & Laundry			
4. Haircuts			
5. Dues (Club or professional dues not listed as business exp.)			
6. Charities, Contributions			
7. Cultural/Recreational (Specify)			
8. Other (Specify)			
<b>SUBTOTAL</b>		0	0

**K. Vacation**

1. Self			
2. Children			
3. Summer Camp			
<b>SUBTOTAL</b>		0	0

**L. Gifts (holidays & birthdays)**

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**TOTAL EXPENSES**

0	0	0
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**INSTALLMENT DEBT PAYMENTS**  
**Schedule A**

Name of Creditor	Balance Owed	Payment if bill would clear in a year	Minimum Regular Monthly Payment	Actual Average Monthly Payments
<b>Total Balance and Monthly Payments</b>				
<b>Total Delinquent Payments</b>				

## Emergencies and Future Goals Schedule B

Only fill this section out if there is a short-term expense which you know you will have to make.

Type of Fund	Probable Cost	Date Desired	Amount to set aside per month
Savings			
Educational (Future -- Self)			
Children (do not include college costs; we will discuss these separately.			
Major Appliances and Equipment Replacement			
Home Improvement, Painting, Major Repair.			
Auto Replacement			
Other (specify)			
TOTAL			