

Asset Disclosure

Attach additional sheets if necessary

A. Real Property

Residence Address: _____

Fair Market Value of real estate _____

Date Purchased _____ Purchase Price:_____

Mortgage Company:_____ Account No:_____

Whose name is mortgage in? _____ Joint? _____ Other _____ Specify: _____

Monthly payments: _____ Balance _____

Paid by? Husband _____ Wife _____ Both of you (joint account?): _____

Land Contract? Yes ____ No ____ If yes, in whose name? _____

Home Equity Loan/Line? Yes ____ No ____ With whom? _____

Account No. _____ in whose name? _____

Amount of property taxes: _____ Included in monthly payment? Yes ____ No ____

Monthly Payment: _____ Balance Due: _____

Additional Real Estate? Yes ____ No ____ Address: _____

Fair Market Value of real estate _____

Date Purchased _____ Purchase Price:_____

Mortgage Company:_____ Account No:_____

Whose name is mortgage in? _____ Joint? _____ Other _____ Specify: _____

Monthly payments: _____ Balance _____

Paid by? Husband _____ Wife _____ Both of you (joint account?): _____

Land Contract? Yes ____ No ____ In whose name? _____

Home Equity Loan/Line? Yes ____ No ____ With whom? _____

Account No. _____ in whose name? _____

Amount of property taxes: _____ Included in monthly payment? Yes ____ No ____

Monthly Payment: _____ Balance Due: _____

B. Vehicles (car, boat, trailer, motorcycle, snowmobile, etc.)

1. Year/Make _____	VIN No. _____
In whose name? _____	Who has possession? _____
Purchase price? _____	Monthly payment? _____
Lien holder? _____	Balance due? _____
2. Year/Make _____	VIN No. _____
In whose name? _____	Who has possession? _____
Purchase price? _____	Monthly payment? _____
Lien holder? _____	Balance due? _____
3. Year/Make _____	VIN No. _____
In whose name? _____	Who has possession? _____
Purchase price? _____	Monthly payment? _____
Lien holder? _____	Balance due? _____
4. Year/Make _____	VIN No. _____
In whose name? _____	Who has possession? _____
Purchase price? _____	Monthly payment? _____
Lien holder? _____	Balance due? _____
5. Year/Make _____	VIN No. _____
In whose name? _____	Who has possession? _____
Purchase price? _____	Monthly payment? _____
Lien holder? _____	Balance due? _____

C. Bank accounts or credit union accounts:

1. Name of Bank or Credit Union and Branch: _____

Account No. _____ Type of account: _____

Who can sign on account: _____

Source of monies (wages, child support, Social Security payments, etc.)? _____

Balance in account: _____

2. Name of Bank or Credit Union and Branch: _____

Account No. _____ Type of account: _____

Who can sign on account: _____

Source of monies (wages, child support, Social Security payments, etc.)? _____

Balance in account: _____

3. Name of Bank or Credit Union and Branch: _____

Account No. _____ Type of account: _____

Who can sign on account: _____

Source of monies (wages, child support, Social Security payments, etc.)? _____

Balance in account: _____

D. Individual Retirement Accounts (IRAs):

1. Financial Institution: _____

Account No: _____ Balance: _____

In whose name? _____

2. Financial Institution: _____

Account No: _____ Balance: _____

In whose name? _____

E. Retirement plans, pensions, Keoughs, 401Ks, profit sharing plans, stock bonus, stock options, etc.

1. Employer or financial institution: _____

Name and type of plan: _____

Value _____ Account No. _____

In whose name? _____ Vested? Yes _____ No _____

2. Employer or financial institution: _____

Name and type of plan: _____

Value _____ Account No. _____

In whose name? _____ Vested? Yes _____ No _____

3. Employer or financial institution: _____

Name and type of plan: _____

Value _____ Account No. _____

In whose name? _____ Vested? Yes _____ No _____

F. Corporate stocks, bonds, notes, securities, bills, brokerage accounts:

1. Name of Broker and firm holding investments: _____

Type of investment: _____ In whose name? _____

Account No: _____ Purchase price: _____

Current value: _____

What was Source of stock or funds to purchase? _____

2. Name of Broker and firm holding investments: _____

Type of investment: _____ In whose name? _____

Account No: _____ Purchase price: _____

Current value: _____

What was Source of stock or funds to purchase? _____

G. Patents, inventions, copyrights, etc: _____

H. Life Insurance & Estate Planning

Will Trust

Durable Power of Attorney Medical Power of Attorney

Client

Name of insurer: _____

Name of insured: _____

Name of beneficiary: _____

Type of insurance: (term, whole life, etc?)

Policy No: _____

Amount of policy: _____

Cash surrender value: _____

Loans against policy: _____

Spouse

Name of insurer: _____

Name of insured: _____

Name of beneficiary: _____

Type of insurance: (term, whole life, etc?)

Policy No. _____

Amount of policy: _____

Cash surrender value: _____

Loans against policy: _____

I. Business Interests (corporations, partnerships, sole proprietorships, etc.)

Name and type of business interest: _____

Type of ownership interest: _____

Value of interest: _____

Initial investment and when: _____

Additional amounts invested and when: _____

J. Community Property (acquired property with spouse):

Have you ever lived in a state which has a community property law (California, Texas, New Mexico, Arizona, Washington, Louisiana, Nevada and Idaho?) Yes ____ No ____

If yes, provide details and status of assets brought into this state: _____

K. Miscellaneous Assets:

Jewelry: _____

_____ Value: _____

Art work: _____

_____ Value: _____

Antiques: _____

_____ Value: _____

Coin and other collections: _____

_____ Value: _____

Inheritances: _____ Value: _____

Annuities: _____ Value: _____

Safe Deposit Box? Yes ____ No ____ Location: _____

Accounts Receivable: _____

L. Gifts: Have you or your spouse made any substantial gifts in the past or placed property in joint names with anyone other than spouse? Yes ____ No ____

If yes, please provide details: _____

M. Trust Beneficiaries: Are you or your spouse the beneficiary under any trust?

Yes No If yes, please provide details: _____

N. Assets held at the time of marriage: _____

O. Are you aware of assets being given away, sold or hidden from you?

Yes No If yes, briefly explain: _____

Liabilities

Please indicate with an asterisk any accounts which are delinquent.

Indebtedness: credit cards, educational loans, personal loans, etc.

1. Creditor: _____ Account No. _____

Type of indebtedness (credit card, etc.): _____

Is account current? Yes ____ No ____ Present balance due: _____

Monthly payment: _____ Named borrower(s): _____

Who will pay until the divorce judgment: _____

2. Creditor: _____ Account No. _____

Type of indebtedness (credit card, etc.): _____

Is account current? Yes ____ No ____ Present balance due: _____

Monthly payment: _____ Named borrower(s): _____

Who will pay until the divorce judgment: _____

3. Creditor: _____ Account No. _____

Type of indebtedness (credit card, etc.): _____

Is account current? Yes ____ No ____ Present balance due: _____

Monthly payment: _____ Named borrower(s): _____

Who will pay until the divorce judgment: _____

4. Creditor: _____ Account No. _____

Type of indebtedness (credit card, etc.): _____

Is account current? Yes ____ No ____ Present balance due: _____

Monthly payment: _____ Named borrower(s): _____

Who will pay until the divorce judgment: _____

5. Creditor: _____ Account No. _____

Type of indebtedness (credit card, etc.): _____

Is account current? Yes ____ No ____ Present balance due: _____

Monthly payment: _____ Named borrower(s):_____

Who will pay until the divorce judgment: _____

6. Creditor: _____ Account No. _____

Type of indebtedness (credit card, etc.): _____

Is account current? Yes No Present balance due: _____

Monthly payment: _____ Named borrower(s):_____

Who will pay until the divorce judgment: _____

Delinquent indebtedness:

Mortgage? Yes No How much? _____ How long overdue? _____

Property? Yes No How much? _____ How long overdue? _____

Income taxes? Yes No How much? _____ How long overdue? _____

Vehicle Loan? Yes No How much? _____ How long overdue? _____

Other? _____ How much? _____ How long overdue? _____

Business debts:

What kind? _____ How
much? _____ How long overdue? _____

Other obligations (alimony to former spouse) _____

Is anyone other than spouse and identified children financially dependent on you? Yes No
If yes, who? _____

Dependent on your spouse? Yes No If yes, who? _____

Give details: _____

Divorce Supplement Inventory

The items checked below are needed to complete your divorce file. Please collect the items which have been checked and bring in copies or originals to the paralegal as soon as possible:

<u>ITEMS NEEDED</u>	<u>ITEMS RECEIVED</u>
<input type="checkbox"/> Tax returns with schedules and W-2s for the last 3 years personal and business, state and federal	<input type="checkbox"/>
<input type="checkbox"/> Paycheck stubs for the last 2 months: Indicate if any deductions are mandatory (other than taxes). Include any union dues, pensions, etc.	<input type="checkbox"/>
<input type="checkbox"/> client	<input type="checkbox"/>
<input type="checkbox"/> spouse	<input type="checkbox"/>
<input type="checkbox"/> Mortgage Statement	<input type="checkbox"/>
<input type="checkbox"/> Document/Deed showing legal description for property(ies):	<input type="checkbox"/>
<input type="checkbox"/> Marital home	<input type="checkbox"/>
<input type="checkbox"/> Vacation home	<input type="checkbox"/>
<input type="checkbox"/> Income Property	<input type="checkbox"/>
<input type="checkbox"/> Retirement, Pension, Profit Sharing, or Stock statements:	<input type="checkbox"/>
<input type="checkbox"/> client	<input type="checkbox"/>
<input type="checkbox"/> spouse	<input type="checkbox"/>
<input type="checkbox"/> Car titles:	<input type="checkbox"/>
<input type="checkbox"/> client	<input type="checkbox"/>
<input type="checkbox"/> spouse	<input type="checkbox"/>
<input type="checkbox"/> Life Insurance Cash Value Statement	<input type="checkbox"/>
<input type="checkbox"/> Savings Account Statements	<input type="checkbox"/>
<input type="checkbox"/> Investment Account Balance Statements	<input type="checkbox"/>
<input type="checkbox"/> Appraisal for _____	<input type="checkbox"/>
<input type="checkbox"/> Appraisal for _____	<input type="checkbox"/>
<input type="checkbox"/> Prenuptial or postnuptial agreement	<input type="checkbox"/>
<input type="checkbox"/> Copy of Driver License	<input type="checkbox"/>
<input type="checkbox"/> Copy of Health and Dental Insurance Card(s)	<input type="checkbox"/>
<input type="checkbox"/> Copy of Wills, Trust, Power of Attorney	<input type="checkbox"/>
<input type="checkbox"/> Copy of any Support, Custody, or Visitation Orders,	<input type="checkbox"/>