

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

Spouse

Name of insurer: _____

Name of insurer: _____

Name of insured: _____

Name of insured: _____

Name of beneficiary: _____

Name of beneficiary: _____

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

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

Policy No: _____

Policy No. _____

Amount of policy: _____

Amount of policy: _____

Cash surrender value: _____

Cash surrender value: _____

Loans against policy: _____

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