

Financial Worksheet Instructions

This worksheet asks for information on the following topics: **Financial Assets; Debts and Liabilities; Additional Information; Real Property; Child Support** and **Spousal Support**. This worksheet will help you gather all information necessary to file for divorce. **Read these instructions prior to filling out this worksheet.**

1. Fill out this worksheet to the best of your ability. If you do not know something or do not know how to find the information, don't worry about it. We will discuss how to obtain the information during our meeting.
2. Please only fill out one of these documents per family, not one for each of you. However, if you don't have time to fill out the same form or prefer not to, you can each fill out your own.
3. Please fill out and return the **Financial Accounts** and **Debts and Liabilities** sections. You only need to fill out **Real Property** if you own a home, building, land or timeshare. You only need to fill out **Child Support** and **Health Insurance for Children** if you have joint children under the age of 21. If you are faxing, mailing or hand-deliver this worksheet, please only return the pages that apply to you. If you are emailing this worksheet you can include all pages, even if they do not apply to you.
4. The more information you can fill out, the more efficient our meeting will be. However, it is not necessary to postpone a meeting if you cannot fill this out prior to the meeting – it is fine to submit it after the meeting.
5. If something does not apply to your case, leave it blank.
6. If you have the exact financial amount information, include it. If you do not have exact figures, just use approximate figures. **To the extent possible, please provide substantiating documentation for everything included in this worksheet. You can bring these documents with you to the meeting.**
7. Important: Do not try to decide who gets what unless both of you agree! We will discuss distribution of all assets and debts in our meeting – that's what the mediation is for.
8. If you need more space to enter information you can either attach a blank sheet or print a second copy of the applicable worksheet and fill that out.

After you have filled out this worksheet please scan and email the documents to forrest@mediatingattorney.com. We prefer to receive the worksheet the day before the mediation appointment if possible. You can bring the substantiating documentation to the meeting and do not need to send it in advance.

Clients: _____

Financial Assets

All financial accounts need to be identified and divided. Use this worksheet to identify all financial accounts, including but not limited to: savings accounts; checking accounts; brokerage (stock) accounts; retirement accounts (401k, PERS, IRAs, deferred compensation accounts, etc.); CD's; and money market accounts.

Asset	Amount	Name on Acct	Last 4 of Acct
<i>Example: Key Bank checking</i>	<i>\$690</i>	<i>Wife</i>	<i>2489</i>
<i>Example: Ameritrade IRA</i>	<i>\$27,600</i>	<i>Both</i>	<i>6521</i>

Bank Accounts

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

Retirement (401ks, IRAs, etc.)

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

Brokerage Accounts (stocks, etc.)

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

Real Estate – Address

Est. Value

_____	_____
_____	_____
_____	_____

Debts and Liabilities

All debts need to be identified and divided. Use this worksheet to identify all debts, including but not limited to: first and second mortgages; home equity lines of credit; auto loans; student loans; credit cards; personal loans; and tax debts. You do not need to list utilities, phone bills or other similar monthly payments unless they have past-due balances.

<u>Debt</u>	<u>Amount</u>	<u>Name on Acct</u>	<u>Last 4 of Acct</u>
<i>Example: Chase Credit Card</i>	<i>\$3,200</i>	<i>Husband</i>	<i>5982</i>
<i>Example: Wells Fargo 2nd Mtg.</i>	<i>\$45,000</i>	<i>Both</i>	<i>3786</i>
Mortgages/HELOCs			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Credit Cards			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Auto Loans			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Student Loans			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
Misc. Debts			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Additional Information

Life Insurance. Please include: Policy name, policy number and face value for all policies. Include cash value and outstanding loans if applicable.

Vehicles. Please include: Year, make, model and VIN#. Also indicate who will keep which vehicle (if already agreed upon).

Personal Property. Please include any significant items of personal property or furniture that need to be addressed. **This is optional. You don't need to fill this in if you have already divided things or if you are confident you can figure this out yourselves.**

Misc. Assets. Are there any other assets that were not already covered? This could include business interests, intellectual property, valuable collections, etc.

Real Property

Fill this information out to the extent known. **The legal description of the property can usually be found on your property tax statement or on purchase or refinance documentation and will look something like this: "Block 6, Lot 14 of Witham Hill."**

Property 1: _____

Address: _____

Legal Description: _____

Who is on the title? _____ Both

Who is on the 1st mortgage? _____ Both N/A Payment: _____

Who is on the 2nd mortgage? _____ Both N/A Payment: _____

Who is on the HELOC? _____ Both N/A Payment: _____

Property 2: _____

Address: _____

Legal Description: _____

Who is on the title? _____ Both

Who is on the 1st mortgage? _____ Both N/A Payment: _____

Who is on the 2nd mortgage? _____ Both N/A Payment: _____

Who is on the HELOC? _____ Both N/A Payment: _____

Property 3: _____

Address: _____

Legal Description: _____

Who is on the title? _____ Both

Who is on the 1st mortgage? _____ Both N/A Payment: _____

Who is on the 2nd mortgage? _____ Both N/A Payment: _____

Who is on the HELOC? _____ Both N/A Payment: _____

Child Support and/or Spousal Support

Spouse A: _____

Spouse B: _____

The following information is required to calculate child support and analyze spousal support (alimony). Please bring your most recent tax return, your most recent paystub and information regarding any other income that you have from any source. **Please fill this out if you have children under 21 or if one spouse may end up paying spousal support.**

Spouse A's gross income per pay period: _____

How often is Spouse A paid: Weekly Every two weeks 2x/Mo Monthly

Does Spouse A get bonuses, commissions, business income, rental income or income from any other source? How much and how frequently:

Spouse B's gross income per pay period: _____

How often is Spouse B paid: Weekly Every two weeks 2x/Mo Monthly

Does Spouse B get bonuses, commissions, business income, rental income or income from any other source? How much and how frequently:

Additional Child Support Factors

Cost of daycare: _____ Who pays daycare: _____

Who provides health insurance for the children? _____

How much does Parent A pay JUST for his or her health insurance: _____

How much does Parent A pay for insurance JUST for the children: _____

How much does Parent B pay for JUST for his or her health insurance: _____

How much does Parent B pay for insurance JUST for the children: _____

Have you agreed to a child support amount already, and if so, how much: _____