



FINANCIAL WORKSHEET (Divorce)

PREMARITAL PROPERTY (needed in all cases)

Did you own anything of value before your marriage (i.e. car, or retirements?)? If yes, identify the following:

Name of Asset	Value at time of marriage	Current Value
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

Did you co-mingle any of the above assets OR put the asset in your spouse's name after you married? If yes, explain: _____

INHERITANCES OR GIFTS

If you received any inheritances or gifts before or during your marriage from persons other than your spouse, please identify:

Asset Inherited/Gifted	Date Received	Current Value
_____	_____	\$ _____
_____	_____	\$ _____

FINANCIAL ACCOUNTS

Checking Accounts

- 1). Name(s) on account: _____
 Account No.: _____ Balance: \$ _____
 Bank Name and Address: _____
- 2). Name(s) on account: _____
 Account No.: _____ Balance: \$ _____
 Bank Name and Address: _____
- 3). Name(s) on account: _____
 Account No.: _____ Balance: \$ _____
 Bank Name and Address: _____

Savings Accounts

- 1). Name(s) on account: _____
 Account No.: _____ Balance: \$ _____

Bank Name and Address: _____

2). Name(s) on account: _____

Account No.: _____ Balance: \$ _____

Bank Name and Address: _____

Certificates of Deposits

1). Name(s) on certificate: _____

Account No.: _____ Balance: \$ _____

Bank Name and Address: _____

2). Name(s) on certificate: _____

Account No.: _____ Balance: \$ _____

Bank Name and Address: _____

Stocks, Bonds, Mutual Funds

1). Name(s) on account: _____

Account No.: _____ Balance: \$ _____

Bank Name and Address: _____

2). Name(s) on account: _____

Account No.: _____ Balance: \$ _____

Bank Name and Address: _____

3). Name(s) on account: _____

Account No.: _____ Balance: \$ _____

Bank Name and Address: _____

REAL ESTATE

Current Residence

1). Address: _____

Titled in: Husband Wife Both Other: _____

Date purchased: _____ Purchase Price: \$ _____

Balance of First Mortgage: \$ _____

Balance of Second Mortgage: \$ _____

Balance of Equity Lines: \$ _____

How much did you put down on the property? \$ _____

Where did you get the down payment? _____

Prior Residence or Rental Properties

2). Address: _____

Titled in: Husband Wife Both Other: _____

Date purchased: _____ Purchase Price: \$ _____

Balance of First Mortgage: \$ _____

Balance of Second Mortgage: \$ _____

Balance of Equity Lines: \$ _____

How much did you put down on the property? \$ _____

Where did you get the down payment? _____

RETIREMENT PLANS

Husband's/ Father's

- 1). Name of custodian or company: _____
Type of Plan: IRA Keogh 401K Pension Profit Sharing
Balance: \$ _____ Years contributed: _____ Vested: Y N
Loans or withdrawals? \$ _____ Reason: _____
- 2). Name of custodian or company: _____
Type of Plan: IRA Keogh 401K Pension Profit Sharing
Balance: \$ _____ Years contributed: _____ Vested: Y N
Loans or withdrawals? \$ _____ Reason: _____
- 3). Name of custodian or company: _____
Type of Plan: IRA Keogh 401K Pension Profit Sharing
Balance: \$ _____ Years contributed: _____ Vested: Y N
Loans or withdrawals? \$ _____ Reason: _____

Wife's/ Mother's

- 1). Name of custodian or company: _____
Type of Plan: IRA Keogh 401K Pension Profit Sharing
Balance: \$ _____ Years contributed: _____ Vested: Y N
Loans or withdrawals? \$ _____ Reason: _____
- 2). Name of custodian or company: _____
Type of Plan: IRA Keogh 401K Pension Profit Sharing
Balance: \$ _____ Years contributed: _____ Vested: Y N
Loans or withdrawals? \$ _____ Reason: _____
- 3). Name of custodian or company: _____
Type of Plan: IRA Keogh 401K Pension Profit Sharing
Balance: \$ _____ Years contributed: _____ Vested: Y N

VEHICLES: CARS/ BOATS/ RVS

- 1). Make/Model: _____ Purchase Price: \$ _____
 Titled in name of: _____ Present Value: \$ _____
 Lien owed: \$ _____ Lien Holder: _____
 Do you want this vehicle? Y N Paid off on: _____
- 2). Make/Model: _____ Purchase Price: \$ _____
 Titled in name of: _____ Present Value: \$ _____
 Lien owed: \$ _____ Lien Holder: _____
 Do you want this vehicle? Y N Paid off on: _____
- 3). Make/Model: _____ Purchase Price: \$ _____
 Titled in name of: _____ Present Value: \$ _____
 Lien owed: \$ _____ Lien Holder: _____
 Do you want this vehicle? Y N Paid off on: _____

INSURANCE (medical, dental, vision, life)

- 1). Health Insurance Carrier: _____
- 2). Who carries the health insurance? Husband Wife Both
- 3). Who is covered under the policy? _____
- 4). Monthly Premium Amount: \$ _____
- 5). What other insurance do you have? _____
 Monthly premium? \$ _____
 Who is covered? _____

ADDITIONAL ASSETS

Do you have any additional items considered significant in value such as Rolex watches, guns or art work? If yes, identify the asset, purchase price, and current value:

Asset	Purchase Price	Current Value
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

PRIOR COURT ORDERS

County: _____ Judge: _____

Amount of child support ordered to pay: \$ _____

Amount of alimony ordered to pay: \$ _____

If you are not complying with the order, explain: _____

