



FINANCIAL WORKSHEET

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: _____

