

**Personal Monthly living expenses**

- 1) One way we try to keep our fees lower is to have you complete the information below and then have us review it. If you need help, I am more than happy to do so. However, the only one making any money in my office is me
- 2) Most of the time approximations may work, however this information is use to complete sworn documents and the other side can inquire to the accuracy.
- 3) If the sworn documents are inaccurate then that will hurt your credibility, and possible other legal issues can present themselves
- 4) The best way to answer each of these questions is to take the average of the 3 prior months from your bank statement and credit cards
- 5) If you work out of the home, please put an \*next to the item below along with the amount
- 6) The worksheet below is for your main home only, if you have a rental property please let me know. I will send you an additional worksheet
- 7) To keep your 10% discount please provide the information below within 5 days from today
- 8) If you own your own business I will need you to provide me a year to date profit and loss statement. Preferably from QuickBooks/Quicken. If you do not have your information in that type of business software then please let me know

Automobile Insurance \$ \_\_\_\_\_ (not your former spouse's vehicle)

Automobile Gas \$ \_\_\_\_\_

Automobile Payments \$ \_\_\_\_\_ (circle one (lease or own))

Automobile Repairs \$ \_\_\_\_\_

Association fees \$ \_\_\_\_\_ (Homeowners/Condo)

Cable TV \$ \_\_\_\_\_

Child support \$ \_\_\_\_\_ (payment for other than children of this marriage)

Clothing \$ \_\_\_\_\_ (just for you)

Clothing \$ \_\_\_\_\_ (just for your children)

Credit card payments \$ \_\_\_\_\_ (Please list each credit card on separate sheet)

Day care \_\_\_\_\_ \$ \_\_\_\_\_ (if paid to a family member, I need to see proof)

Dry Cleaning \_\_\_\_\_ \$ \_\_\_\_\_

Electricity \_\_\_\_\_ \$ \_\_\_\_\_

Entertainment \_\_\_\_\_ \$ \_\_\_\_\_ (movies, golf, bowling, etc.)

Equity line of \_\_\_\_\_ \$ \_\_\_\_\_ (main home only)

Food \_\_\_\_\_ \$ \_\_\_\_\_

Gas for the home \_\_\_\_\_ \$ \_\_\_\_\_

Gifts \_\_\_\_\_ \$ \_\_\_\_\_ (Birthday, holiday, etc.)

Health Insurance \_\_\_\_\_ \$ \_\_\_\_\_ (for just you)

Health Insurance \_\_\_\_\_ \$ \_\_\_\_\_ (for your children)

Hygiene \_\_\_\_\_ \$ \_\_\_\_\_ (Hair, nails, facials, cosmetics etc.)

Life Insurance \_\_\_\_\_ \$ \_\_\_\_\_

Medical \_\_\_\_\_ \$ \_\_\_\_\_ (Doctor, eyeglass, co pays, etc. for just you)

Medical \_\_\_\_\_ \$ \_\_\_\_\_ (Doctor, eyeglass, co pays, etc. for just the children)

Mortgage payment \_\_\_\_\_ \$ \_\_\_\_\_ (main home only)

Property tax \_\_\_\_\_ \$ \_\_\_\_\_ (divide by 12 if necessary)

Repairs \_\_\_\_\_ \$ \_\_\_\_\_ (Home repairs)

Rent \_\_\_\_\_ \$ \_\_\_\_\_

School supplies/lunch \_\_\_\_\_ \$ \_\_\_\_\_

School Tuition \_\_\_\_\_ \$ \_\_\_\_\_ (private school for minor children)

Telephone \_\_\_\_\_ \$ \_\_\_\_\_

Water \_\_\_\_\_ \$ \_\_\_\_\_

## Assets/Liabilities

- 1) The information below is listed as of follows. Left column is for the date of marriage the right side is for the date of the divorce filing
- 2) If you separated prior to divorce, and the numbers are significantly different than either on the date of marriage or the date of divorce filing please let me know
- 3) Remember I will need 6 months of statements for each of the bank, credit card, investment bank accounts that you have. The most cost effective way of providing me this information is emailing it to me (Then I do not have to scan it and charge you for doing the same) Plus you keep your 10% discount if you do so within 5 days of this request
- 4) Please enter the VALUE and not the COST. We do not need formal appraisal at this point. You can look on line at Zillow (for real estate) or Kelly blue book (for automobile)
- 5) Next to each item of the owner if you know it please mark M = Mine, T=theirs, C = Children, J = joint

<u>M/T/C/J</u>	<u>Name</u>	<u>Date of Marriage</u>	<u>Date of DIVORCE Filing</u>
	<u>Checking Bank Name</u>	\$	\$
	<u>Checking Bank Name</u>	\$	\$
	<u>Savings Bank Name</u>	\$	\$
	<u>Savings Bank Name</u>	\$	\$
	<u>Savings Bank Name</u>	\$	\$
	<u>Investment Bank Name</u>	\$	\$
	<u>Investment Bank Name</u>	\$	\$
	<u>Investment Bank Name</u>	\$	\$
	<u>Home address</u>	\$	\$
	<u>Automobile yours</u>	\$	\$
	<u>Automobile yours</u>	\$	\$
	<u>Automobile child</u>	\$	\$
	<u>Automobile child</u>	\$	\$

Automobile child	\$	\$
Automobile spouse's	\$	\$
Automobile spouse's	\$	\$
Retirement employer	\$	\$
Retirement IRA	\$	\$
Retirement 401k	\$	\$
Retirement name	\$	\$
Loan from Friends/family name	\$	\$

**Liabilities= Amount owed to date (not monthly payment)**

- 1) Not the monthly payment in this section, just total owed
- 2) If any of the amounts are incurred because your former spouse paid for an affair please let me know, and provide me proof asap
- 3) Please ask for a separate sheet for investments (if necessary)
- 4) Next to each item of the owner if you know it please mark M = Mine, T=theirs, C = Children, J = joint

<b>M/T/C/J</b>	<b>Name</b>	<b>Date of Marriage</b>	<b>Date of DIVORCE Filing</b>
	Automobile yours	\$	\$
	Automobile yours	\$	\$
	Automobile child	\$	\$
	Automobile child	\$	\$
	Automobile child	\$	\$
	Automobile spouse's	\$	\$
	Automobile spouse's	\$	\$

Credit card name	\$	\$
Credit card name	\$	\$
Credit card name	\$	\$
Credit card name	\$	\$
Credit card name	\$	\$
Mortgage name	\$	\$
Student Loan name	\$	\$
Student Loan name	\$	\$
Loan to family/friend's name	\$	\$
Loan to family/friend's name	\$	\$
Loan to family/friend's name	\$	\$
Loan from retirement name	\$	\$
Loan from retirement name	\$	\$