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**FINANCIAL DISCLOSURES WORKSHEET
FOR PREMARITAL AGREEMENTS AND PRENUPTIAL AGREEMENTS**

Name _____

The financial information on the following pages is important for the validity of your premarital or prenuptial agreement. If you need help in completing any item, please let us know.

If possible, please bring copies of this information to the mediation, along with documentation for the items on the sheet (i.e., bank statement, appraisals, etc.). A copy of your Federal Income Tax return for the past year and a recent copy of your pay stub or year-to-date income is also helpful.

ASSETS

Enter the value of each of the following items of property as precisely as you can. Also identify the property as precisely as possible, including account numbers, names of banks, etc.

	Fair market value	Amt. you Owe (if any)
A. Real Estate (Residence, Vacation Home, and Rental/investment):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
B. Bank Accounts and Saving Accounts:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

C. Notes, Accounts, (i.e. money owed to you. Indicate by whom payable, amount, and date or dates payable. Include money owed by other spouse):

	Fair market value	Amt. You Owe (if any)
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

D. Stocks, Bonds, Mutual Funds:

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

E. Life Insurance – Name of Company, Policy Number, Face Value, Type (i.e. “term,” “whole life,” etc.):

	Cash-out value (if any)	Death Benefit
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

F. Business or Professional Interests (Please furnish last balance sheet and P&L statement, tax return, buy-sell agreements, etc.):

	Appraised or Fair market value	Business Loans (if any)
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

	Fair market value	Amt. You Owe (if any)
G. Miscellaneous Assets – Patents Trademarks, Copyrights, Royalties Stock Options, etc.:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
H. Personal Effects, Tangible Personal Property (valued at \$500 or more):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
I. Automobiles, motorcycles, other vehicles	\$ _____ *	_____
_____	_____	_____
_____	_____	_____

* Use Kelly Blue Book (www.kbb.com) if unsure of value

TOTAL ASSETS

	Current Statement value	Loans (if any)
I. Pension plans, Keogh, IRAs, Profit Sharing Plans, 401(k):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

II. Defined Benefit Pension Plans (STRS,
CalPERS, other non-contribution plans)
Attach a copy of most recent statement

LIABILITIES

	Amount Owed	Card name & Last 4 digits of account
A. Credit Card Debt:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
B. Loans owed to Banks and Others:	Amount owed	Owed to whom:
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
C. Student Loans:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
D. Other Debts:		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

ANNUAL INCOME

	LAST YEAR	THIS YEAR TO DATE
Gross Salary	\$ _____	\$ _____
Net Salary (income minus taxes and social security)	_____	_____
Dividend Income	_____	_____
Interest Income	_____	_____
Rental Income	_____	_____
Royalty or Residual Income	_____	_____
Other Income	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
SUB TOTAL NET INCOME	_____	_____

DEDUCTIONS FROM INCOME

Mandatory Retirement	_____	_____
IRA/Keogh/401K Contributions	_____	_____
Mortgage Interest	_____	_____
Property Taxes	_____	_____
Child Care	_____	_____
Health Insurance	_____	_____
Hardships (i.e. major medical)	_____	_____
Support for other children	_____	_____
Support for former spouse	_____	_____

Support for aging parents

Support for adult children

NET INCOME
