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WORKSHEET FOR FINANCIAL EXPENSES

In every dissolution of marriage, financial paperwork must be shared with the other party through a process called discovery and ultimately filed with the court. Please use this worksheet to assist you in providing accurate and complete information on your income, expenses, assets and debts. Do not put the same expense or debt in two or more categories. Make any notes you believe we may find helpful.

NOTES:

- 1) If you believe your home will need to be sold, please determine what major/minor work will be required to facilitate the sale. Get estimates for the required work and provide us with copies. Do not delay in contacting a realtor to discuss marketing the home.
- 2) Work-related daycare is considered in the calculation of child support. We need a complete picture of these expenses and any records you can provide, including a tuition schedule. If you have grade school age children, we must calculate the cost during the school year and the summer (indicate how many weeks of each program each year). Please break out for each child and project how many years you will have these costs.
- 3) Be completely upfront and honest. This worksheet will not be provided to the other party nor the court. Our office uses this worksheet to fill out the proper discovery forms for the court.

1) PERSONAL INFORMATION

- a) Your Full Legal Name _____
- b) Your Social Security Number _____
- c) Your Current Address _____
- d) Spouse Full Name _____
- e) Spouse's Social Security Number: _____

2) YOUR INCOME INFORMATION

- a) GROSS wages per pay period _____
- b) How are you paid? Weekly _____ Bi-Weekly (every other week) _____
Monthly _____ Bi-Monthly (1st and 15th) _____

c) Tax status: Single _____ Married _____ Head of Household _____

d) Number of persons claimed as dependents _____

e) Payroll Deductions each pay period:

i) FICA (social security tax) _____

ii) Federal Withholding tax _____

iii) State withholding tax _____

iv) City earnings tax _____

v) Union dues _____

vi) Health insurance premium _____

vii) Medicare _____

viii) Other (please explain) _____

Please explain _____

f) Additional Income (social security income, welfare benefits, etc) _____

Please explain: _____

g) My total Gross income from my tax return (W-2) for each of the **last 3 calendar years**

Year	Amount
20____	
20____	
20____	

3) SPOUSE'S INCOME INFORMATION

a) GROSS wages per pay period _____

b) How is spouse paid? Weekly _____ Bi-Weekly (every other week) _____

Monthly_____ Bi-Monthly (1st and 15th) _____

c) Tax status: Single____ Married_____ Head of Household_____

d) Number of person's claimed as dependents _____

e) Additional Income (social security income, welfare benefits, etc) _____

Please explain: _____

4) MONTHLY EXPENSE INFORMATION

*****ALL EXPENSES ARE ON A MONTHLY BASIS. PLEASE WRITE YOUR ANTICIPATED MONTHLY EXPENSES*****

a) Housing

i) Mortgage/Rent (per month) _____

ii) Subdivision Dues / Assessments _____

iii) Condominium Fees / Assessments _____

b) Maintenance & Repairs of Residence

i) Yard Maintenance:

a. Lawn Service _____

b. Mowing Fees _____

c. Tree/shrub Replacement _____

d. Fertilizer, etc _____

ii) Home Maintenance / Repairs:

a. Sealing Driveway _____

b. Roof Repairs _____

c. Exterminator _____

d. Carpet and Drapery Cleaning _____

e. Furniture and Appliance Maintenance/Replacement _____

f. Pool Expenses _____

g. Window Washing _____

h. Other Major Repairs _____

i. Housekeeper _____

j. Other _____

Please Explain:

c) Utilities:

i) Gas _____

ii) Water _____

iii) Electric _____

iv) Telephone _____

v) Cell Phone _____

vi) Trash _____

vii) Cable _____

viii) Internet _____

d) VEHICLES

i) Gas and oil _____

Routine Maintenance _____

ii) Repairs (if not routine) _____

iii) Tax and License (yearly amount acceptable here) _____

iv) Payment of Car Loan _____

- v) Auto Club _____
- vi) Car Wash _____
- vii) Anticipated Car Payment (if replacement is needed soon) _____
- viii) Boat Payment, Dock Fees, Maintenance, Insurance, Fuel, etc. _____
- ix) Other _____

Please explain:

e) INSURANCE

- i) Life Insurance _____
- ii) Health _____
- iii) Dental _____
- iv) Vision _____
- v) Disability _____
- vi) Homeowners /Renters (if not included in mortgage payment) _____
- vii) Automobile _____
- viii) Cost of Health and Dental Coverage for You Alone _____
- ix) Cost of Health and Dental Coverage for You and Your Dependents _____
- x) Taxes (if not included in mortgage payment) _____

f) OTHER MONTHLY EXPENSES

- i) Payments I make on debts (including credit card) _____
- ii) Child Support for children not in my
custody (and not involved in these proceedings) _____
- iii) Maintenance/Alimony paid by me to persons
other than my current spouse _____

iv) Church and charitable contributions _____

g) OTHER LIVING EXPENSES

i) FOOD FOR MYSELF

a. Lunch at Work _____

b. Grocery Store _____

c. Coffee Shop _____

d. Dinners Out _____

e. Fast Food _____

f. Other _____

ii) FOOD FOR MY CHILDREN
(Does not include school meal program) _____

iii) CLOTHING (Including shoes) _____

a. Purchases for You _____

b. Purchases for Children _____

c. Other _____

iv) MEDICAL EXPENSES

a. Medical Care for Self:

i. Psychiatrist, Therapist, Counseling _____

ii. Dentist _____

iii. Eye Glasses _____

iv. Contact Lenses _____

v. Prescription Drugs _____

vi. Non-Prescription Drugs _____

vii. Deductible on Your Insurance _____

viii. Co-Payments _____

ix. Other _____

b. Medical Care for Child:

i. Psychiatrist, Therapist, Counseling _____

ii. Eye Glasses _____

iii. Contact Lenses _____

iv. Prescription Drugs _____

v. Non-Prescription Drugs _____

vi. Deductible on Your Insurance _____

vii. Co-Payments _____

h) ENTERTAINMENT / RECREATION

i) Newspaper, Magazine, Periodicals, Subscriptions _____

ii) Vacations _____

iii) Parking (non work related) _____

iv) Recreation for Self _____

a. Dining out (not already included in food section) _____

b. Season tickets _____

c. Movie rental _____

d. Recreation for Child _____

i. Dining out (not already included in food section) _____

ii. Season tickets _____

iii. Movie rental _____

v) Laundry and Cleaning _____

vi) Hobbies / Collections _____

vii) Other _____

i) PERSONAL CARE

i) Cosmetics and Toiletries (either here or in food/groceries) _____

ii) Barber Shop / Beauty Salon for self _____

iii) Barber Shop / Beauty Salon for child _____

iv) Other _____

j) **SCHOOL AND BOOKS**

i) School for myself

a. Room / Board _____

b. Tuition _____

c. Books _____

d. Activity Fees _____

e. Spending Money _____

f. Travel Expenses _____

g. School Lunches _____

h. Other _____

ii) School for child(ren)

a. Room / Board _____

b. Tuition _____

c. Books _____

d. Activity Fees _____

e. Spending Money _____

f. Travel Expenses _____

g. Tutoring _____

h. Uniforms _____

i. School Lunches _____

j. Other _____

- iii) Lessons for myself _____
- iv) Lessons for child(ren) _____
- k) EMPLOYMENT RELATED EXPENSES
 - i) Professional Dues/License fees, etc. (other non-reimbursed expenses) _____
 - ii) Professional Subscriptions _____
 - iii) Parking _____
 - iv) Other _____
- l) PETS
 - i) Food _____
 - ii) Veterinary services / medicine _____
 - iii) Other _____
- m) CHILDREN'S MISCELLANEOUS EXPENSES (be specific and provide records if you have them)
 - i) Children's Allowances _____
 - ii) Children's Activities (baseball, soccer, Scouts, etc.) _____
 - iii) Club / Membership dues (YMCA, health club, etc.) _____
- J) Daycare and Babysitting
 - iv) Work Related Daycare _____
 - v) Non-Work Related Daycare _____
 - vi) Before and After School Program _____
 - vii) Work Related Night-Time Sitters _____
 - viii) Non-Work Related Night-Time Sitters _____
 - ix) Summer Camp (indicate if work necessitates this) _____

x) Expenses for Children in Your Custody from Another Marriage _____

xi) Other (list) _____

n) MISCELLANEOUS

i) Religious Affiliated Activities _____

ii) Cigarettes/Cigars _____

iii) Postage and Stationary _____

iv) Music _____

v) Film and Camera Supplies _____

vi) Jewelry _____

vii) Yearly Gifts (Christmas, birthday, etc.) _____

viii) Attorney's Fees _____

ix) Other _____

5) MARITAL ASSETS:

- Include all property purchased during the marriage NO MATTER HOW IT IS TITLED.
- List all property purchased during the marriage even if it is just titled to one spouse.
- List all property purchased during the marriage that you currently possess AND all property currently in your spouse's possession.
- Indicate:
 - o Who should receive the property after the dissolution (award to H or W)
 - o Who possesses the property now (present possession H or W)
- Use another page if extra room is needed.

Real estate	Fair market value	Amount Owed	Award to H or W	Present Possession H or W
Address				
Name on Deed/ Title				
Mortgage Lender				
Address				

Name on Deed/Title				
Mortgage Lender				

Motor Vehicles (includes cars, boats, campers, etc)	Amount owed:	Fair Market Value (Kelly Blue Book)	Award to H or W	Present Possession H or W
Year: Make/Model: VIN: Lien Holder:				
Year: Make/Model: VIN: Lien Holder:				
Year: Make/Model: VIN: Lien Holder:				

Bank Accounts	Current Balance	Name on Account	Award to H or W	Present Possession H or W
Bank Name: Account #: Account Type:				
Bank Name: Account #: Account Type:				
Bank Name: Account #: Account Type:				
Bank Name: Account #: Account Type:				
Bank Name: Account #: Account Type:				

Securities (stocks, bonds, promissory notes, etc.)	Current Balance	Name on Account	Award to H or W	Present Possession H or W
Institution Name: Account #: Account Type:				
Institution Name: Account #: Account Type:				
Institution Name: Account #: Account Type:				
Institution Name: Account #: Account Type:				

Life Insurance	Face Value and Cash Value	Name on Account	Award to H or W	Present Possession H or W
Type of Insurance: Issuing Company: Policy Number: Beneficiary:				
Type of Insurance: Issuing Company: Policy Number: Beneficiary:				
Type of Insurance: Issuing Company: Policy Number: Beneficiary:				
Retirement Plan (list all 401k, profit sharing plan or union benefits)	Name on Account	Present Total Value	Award to H or W	Present Possession H or W
Issuing Company: Plan Name: Percent Vested:				
Issuing Company: Plan Name: Percent Vested:				
Issuing Company: Plan Name: Percent Vested:				

Interest in Trust	Name on Trust	Trust Value	Award to H or W	Present Possession H or W
Name of Trustee: Beneficiaries: Nature of your interest:				
Name of Trustee: Beneficiaries: Nature of your interest:				

Debts Owed to You	Debtor's Name	Amount Owed/ Due Date	Award to H or W	Present Possession H or W
Nature of Debt: Secure or Unsecured:				
Nature of Debt: Secure or Unsecured:				

Interest in Business (Sole Proprietorship, Partnership, LLC or Joint Venture)	Owner's Names	Percent Owned	Award to H or W	Present Possession H or W
Name of Business: Type of Business:				
Name of Business: Type of Business:				

Lawsuits Against Others	Amount of Suit	Pending Court Dates	Award to H or W	Present Possession H or W
Nature of Suit: Case Number: Attorney's Name:				
Nature of Suit: Case Number: Attorney's Name:				

