# Financial Information

PARTY#1'S BACKGROUND II	NFORMATION (PARTY A):	
Name (First, Middle, Last):		
Social security Number:	Gender: Male.	☐ Female.
Date of Birth:	Date of Marriage:	Date Separated
Address:		
City, state Zip:		
Phone:	Cell Phone:	
E-mail:		
Occupation:		_
Employer:		
Employer address:		
Employer city, state, zip:		
Employer phone:		
PARTY#2'S BACKGROUND II  Name (First, Middle, Last):	NFORMATION (PARTY B):	
Social security Number:	Gender: Male.	☐ Female.
Date of Birth:		
Address:		
City, state Zip:		
Phone:	Cell Phone:	
E-mail:		
Occupation:		_
Employer:		
Employer address:		
Employer city, state, zip:		
Employer phone:		

**CHILDREN** 

Child's Name	Date of Birth	Custody Which Party	Exemption Party A or B (A/B)	

# Income and Expenses

WAGES	FOR F	PARTY#1
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Annual wage and salary income, I	before taxes:
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# **WAGE-LIKE INCOME FOR PARTY#1**

Use this sheet to specify income that is not covered on any other sheet. Specify an amount in whichever column (Week, Month, or Year) is most convenient.

		Amount per	
Item	Week	Month	Year
Child support from previous relationship			
Alimony from previous relationship			
Unemployment Compensation			
Public Assistance			
Bonuses			<del></del>
Commissions			·
Tips			
Overtime			
Disability Benefits			
Workers' Compensation			
Royalties			
Rent from Spouse			
Deferred Compensation			
			<del></del>

# **Expense List**

Maintance and repair

On this data sheet, specify the household, child, and personal expenses of everyday life. The list tries to be comprehensive, but there is no need to fill in every line.

**Note:** We suggest that you specify mortgage and/or rental expenses on the data sheets on "Real Estate," not on this data sheet. Specify alimony and support for this spouse on the "Alimony & Support" sheets. Specify education tuition as a "Major Expense," not here.

Enter the amount spent on this item, per week, or per month, or per year (not all three).

Enter Expenses for Party#1	Weekly	Monthly	Annual
Deductions			
Union Dues			
Mandatory Retirement			
Other Mandatory expenses			<del></del>
Health Insurance			
Dental Insurance			<del></del>
Previous Relationship Child Support			
Previous Relationship Spousal Support			<del></del>
[ ] Spousal Support [ ] Partner Support			
Necessary job-related expenses			
Employment Unreimbursed Travel			
Employment Uniforms			
Employment Unreimbursed Education			
a. Home			
Rent Paid			
Real property taxes			
Real Estate Taxes, Assessments			
Condo & Homeowner assoc. fees			
Homeowner's or renter's insurance			
Homeowners insurance			
Renters insurance			

Enter Expenses for Party#1	Weekly	Monthly	Annual
Painting and Wallpapering			
Repairs & Maintenance			
Appliance repairs and replacement			
Lawn & Garden			
Snow Removal			
Maid / Cleaning service			
b. Medical (after insurance proceeds / reimbursement)			
Health care costs for Adults			
Doctor			
Optical			
Dental			
Medication			
Therapy/counseling			
Other Health			
Health care costs for Children			
Doctor			
Optical			
Dental			
Orthodontic			
Medication			
c. Child care			
Child care / Pre or After school care			
Sitters			
d. Food and home supplies			
Groceries			
Food for children			
Liquor			

Enter Expenses for Party#1	Weekly	Monthly	Annual
Non-prescription medications			<del></del>
Cigarettes			·
Lottery			
Pet expenses			
Household Supplies			
Other Supplies			
e. Eating Out			
Eating Out			
f. Utilities (gas, electric, water, trash)			
Gas and Propane			
Heating Fuel Oil			
Electricity			
Other Utilities			
Water and Sewer			
Trash Removal			
g. Telephone, cell phone and e-mail			
Phone Lines			
Cell Phone			
Cable / Satellite TV			
Internet Service Provider			
h. Laundry and Cleaning			
Laundry			
Dry Cleaning			
i. Clothes			
Clothing for adults			
Clothing for children			

Enter Expenses for Party#1	Weekly	Monthly	Annual
j. Education			
Adult education expenses			
Children education expenses			
Lessons Extracurricular Activities			
Education Supplies			
Tuition / Tutors			
Books / Fees			
School lunch			
School Transportation			
School-sponsored activities			
School room and board			
k. Entertainment, gifts, and vacation			
Travel			
Vacations (not including children			
Vacations (children only			
Entertainment			
Gifts			
Sports and hobbies			
Newspapers, magazines, books			
Computer / Supplies / Software			
Club dues and membership			
Horseback			
Children - Clubs / Summer Camps			
Children - Entertainment			
Children - Allowance			
Children - Other			

Enter Expenses for Party#1	Weekly	Monthly	Annual
I. Auto expenses and transportation (insurance, gas, repairs, bus, etc.	c.)		
Gasoline			
Repairs and Maintenance			
Insurance			
License / City Stickers			
Payments (lease or financing			<del></del>
Rental/replacements			<del></del>
Parking			
Tolls			
Public Transportation			
Other			
m. Insurance			
Personal Property Insurance			
Disability Insurance			
n. Savings and investments			
Savings			
Voluntary Retirement			
o. Charitable contributions			
Charitable			
Religious organizations			
p. Monthly payments with debts			
=> Note: Enter monthly payments with debts on "Income from Assets" scr	een above.		
q. Other			
Credit Union			
Deferred compensation			
Legal and Accounting			
Bank charges/credit card fees			

Enter Expenses for Party#1		Weekly	Monthly	Annual	
Hair					
Manicure, Pedicure					
Children - Grooming					
Local Income Tax					
Other Miscellaneous expenses					
	· · · · · · · · · · · · · · · · · · ·				
	· · · · · · · · · · · · · · · · · · ·				
r. Expenses paid by others					
Amount of expenses paid by others					

# 1. INVESTMENTS, CHECKING ACCOUNTS, ETC:

	Current	Original	Annual		Title*
Description	Value	Cost	Income	Type*	(A/B/J)
•					
	· <del></del>				
	· <del></del>				
					-
	· · ·				

<sup>\*</sup> Title (A-Party A, B-Party B, J-Joint)

<sup>\*</sup> Type (1-Cash, 2-Checking, 3-Money Market, 4-Savings, 5-Credit Union, 6-Brokerage Acct, 7-Escrow Acct, 8-CD, 9-US Savings Bonds, 10-Stock, 11-Bond, 12-Stock Fund, 13-Mutual Fund, 14-Bond Fund, 15-Real Estate)

# 2. DEBTS:

Description		Current Balance	Interest Rate (%)	Monthly Payment
3. PERSONAL ITEMS:				
	Current	Original	Title*	
Description	Value	Cost	(A/B/J)	Type*


<sup>\*</sup> Title (A-Party A, B-Party B, J-Joint)

# 4. VEHICLES:

	Current	Original		Title*	
Make/Model/Year	Value	Cost	Type*	(A/B/J)	Lien
	Make/Model/Year				

<sup>\*</sup> Type (1-Car, 2-Truck, 3-RV, 4-Boat, 5-Plane)

<sup>\*</sup> Type (1-Household, 2-Furniture, 3-Art, 4-Jewlery, 5-Paintings, 6-Prints, 7-Antiques, 8-Precious Object, 9-Gold or Metals, 10-Collections, 11-Tradmarks, 12-Patents, 13-Other)

<sup>\*</sup> Title (A-Party A, B-Party B, J-Joint)

# 5. REAL ESTATE:

Basic Info:	1st Property	2nd Property	3rd Property	
Address:				
Current Value:				
Original Cost:				
Title (A, B, J)*:				
1st Mortgage:				
Balance:				
Interest Rate (%):				
Monthly Payment*:				
Statement Month/Year:				
Who will pay (A/B/Both):				
2nd Mortgage:				
Balance:				
Interest Rate (%):				
Monthly Payment*:				
Statement Month/Year:				
Who will pay (A/B/Both):				

<sup>\*</sup> For monthly payment include interest & principal only, do NOT include taxes or insurance.

<sup>\*</sup> Title (A-Party A, B-Party B, J-Joint)

6. IRA/401k ACCOUNTS:				
	Current	Title*		
Description	Value	(A/B)		
		<del></del>		
		<u> </u>		
		<u> </u>		
		<u> </u>		
		<u> </u>		
* Title (A-Party A, B-Party B)				
7. LIFE INSURANCE:				
		Amount of	Amount of	
		Premium	Premium	
Paradatta	Cash	Paid By	Paid By	Title*
Description	Value	Party A	Party B	(A/B)
			_	
			_	
			_	
				_
			_	

\* Title (A-Party A, B-Party B)

Peace Talks Mediation Services Prepared by Ms. Stephanie Maloney, CFP, CDFA (c) Family Law Software, Inc. v 23.01 2/2/2021 7:25pm Husaband Sample & Wife Sample

# 8. BUSINESS:

Paradidlar	Current	Original	Annual Cash	Form of Business	Title*
Description	Value	Cost	Flow	(I/P/C)*	(A/B)

<sup>\*</sup> Title (A-Party A, B-Party B, J-Joint)

<sup>\*</sup> Form of Business (I-Individual, P-Partnership or S Corporation, C-C Corporation)