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Diana Mercer, Esq
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FINANCIAL INFORMATION AND INCOME STATEMENT

Name _____

The financial information on the following pages is important. If you need help in completing any item, please let the Dispute Resolution Associate know.

Please bring this information to the mediation session, along with documentation for the items on the sheet (i.e., bank statement, appraisals, etc.). Please also bring or have available copies of Federal and State income Tax returns for the past three years and W-2 forms or copies of your pay stubs.

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. List according to the name the property is titled under.

	Fair market value (what you could sell it for today)	Mortgage (debt owed)
A. Real Estate (Residence, Vacation Home, and Investment):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

B. Checking Accounts and Saving Accounts: List bank or financial institution and last 4 digits of account number:

_____	\$ _____
_____	_____
_____	_____



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	Fair market value (today's sale price)	Loan amount owed today
C. Vehicles, Boats, Trailers (year, make and model):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____
D. Credit Union and Deposit Accounts (Account name, number, bank and Branch) :		
_____	\$ _____	
_____	_____	
_____	_____	
E. Cash (Give location):		
_____	\$ _____	
_____	_____	
_____	_____	
F. Tax Refund: tax year & amount, State or Federal debt		
_____	\$ _____	
_____	_____	
_____	_____	
G. Miscellaneous Assets – Patents Trademarks, Copyrights, Royalties Stock Options, etc.:	Fair market value	Debt owed
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____



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H. Life Insurance with Cash Surrender or Death Benefit Loan:	Cash Value	Loan amt.
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

H. Stocks, Bonds, Secured Notes, Mutual Funds: List financial institution & acct. number		Loan?
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

I. Personal Effects, Antiques or Art, Tangible Personal Property (valued at \$500 or more):		
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

J. Pension plans, Keogh, IRAs or Profit Sharing Plans, (Please Furnish last statement):	Today's Value	Loan Amt
_____	\$ _____	_____
_____	_____	_____

K. Accounts Receivable and Unsecured Notes: (money others owe you)	Amount	
_____	\$ _____	_____
_____	_____	_____
_____	_____	_____



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L. Partnerships and Other Business Interests:

Fair market value Loans owed

_____	\$ _____	_____
_____	_____	_____
_____	_____	_____

If you are involved in a lawsuit (either plaintiff or defendant) or have separate property claims (premarital assets, inheritances, gifts from your family), please let us know.

TOTAL ASSETS

LIABILITIES

Amount you owe today

A. Student Loans: List debtor and acct #

_____	\$ _____
_____	_____
_____	_____

B. Personal Loans and Notes Payable to Banks and Others:

_____	\$ _____
_____	_____
_____	_____

C. Credit Card Debts: (list card name & number) Amount you owe today

_____	\$ _____
_____	_____
_____	_____

D. Other Debts (including store charges, debts to other spouse or parents):

Amount you owe today

_____	\$ _____
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_____	_____
_____	_____

A. Taxes owed: (give tax year and state or federal) Amount you owe today

_____	\$ _____
_____	_____
_____	_____

TOTAL LIABILITIES
