

In re the Marriage of:

Petitioner,  
and

Case No.  
Family  
Code No.

Respondent.

**PETITIONER'S [RESPONDENT'S]  
PRELIMINARY [FINAL] FINANCIAL DISCLOSURE STATEMENT**

<u>PETITIONER</u>	<u>RESPONDENT</u>
Name:	Name:
Address:	Address:
Social Security No.:	Social Security No.:
Birthdate:                      Age:	Birthdate:                      Age:
Employer:	Employer:
Occupation:	Occupation:
Date of Filing Summons:	Date of Service of Summons:
Date of Separation:	Date of Marriage:

**CHILDREN**

**Name    Birthdate    Age**

With whom are the children living? \_\_\_\_\_

**I. STATEMENT OF INCOME**

Attach copies of state and federal income tax returns for the last two taxable years and wage statements from your employer for the last eight weeks. (Note: To arrive at monthly income figure if paid weekly, multiply weekly income by 4.3; if paid biweekly, multiply biweekly income by 2.15).

I am paid [weekly ( ), biweekly ( ), semimonthly ( ), monthly ( )]

	<u>Petitioner Respondent</u>
<b>A. <u>Gross Monthly Income from:</u></b>	
Salary and wages, including commissions, Allowances, and overtime:	\$
Dividend and interest income, if any:	\$
Rental income, if any:	\$
Income from any other source (i.e., retirement or pension income, social security, welfare, disability benefits, unemployment or worker's compensation, etc.):	\$
<b>TOTAL GROSS MONTHLY INCOME:</b>	<b>\$</b>
<b>B. <u>Monthly Deductions from Gross Income:</u></b>	
State income taxes:	\$
Federal income taxes:	\$
Social Security:	\$
Medical or other insurance:	\$
Union or other dues:	\$
Retirement or pension fund: [Specify whether mandatory ( ) or voluntary ( )]	\$
Savings plan:	\$
Other (specify):	\$
<b>TOTAL MONTHLY DEDUCTIONS:</b>	<b>\$</b>
<b>C. NET MONTHLY INCOME (Take Home Pay):</b>	<b>\$</b>

## **II. STATEMENT OF EXPENSES**

Specify the number of members in each household whose expenses are included and list the members' names and relationship:

Petitioner( ) \_\_\_\_\_

Respondent( ) \_\_\_\_\_

Estimated *Monthly* Expenses of Living Apart for:

	<u>Petitioner</u> <u>Respondent</u>
1. Rent or home mortgage payments for residence (including parking space):	\$
2. Real property taxes (residence) (separate if more than one property):	\$
3. Real property insurance (residence):	\$
4. Maintenance (e.g. home, yard, snow, furnace, appliances, furniture, service contracts, condo charges):	\$
5. Food and household supplies (include work/school lunches, coffee breaks):	\$
6. Utilities (include water, electricity, gas, oil, heat, trash collection):	\$
7. Telephone:	\$
8. Laundry and cleaning:	\$
9. Clothing (include shoes and accessories for work and leisure, children's needs):	\$
10. Medical and drug expenses not covered by insurance (include over-the-counter meds, eye glasses):	\$
11. Dental expenses not covered by insurance:	\$
12. Insurance (life, health, accident, comprehensive, liability, disability) (exclude payroll deducted):	\$
13. Child care and/or child visitation expenses (include baby-sitting and day care):	\$
14. Payment of child/spousal support re prior marriage:	\$
15. School (expenses for child and/or adult; e.g., tuition, fees, books, supplies, transportation, tutors, plus piano):	\$
16. Entertainment (e.g., clubs, social obligations, recreation, camp, sports, restaurants, self-improvement, cable TV):	\$
17. Incidentals (beauty/personal hygiene, tobacco, newspapers, periodicals, pets, hobbies, collections at home or office):	\$
18. Transportation (other than automobile):	\$
19. Auto expenses (gas, oil, repairs, insurance, depreciations):	\$
20. Auto payments:	\$
21. Installment payment(s) (e.g., student loans, personal loans) (insert total and	

	attach itemized schedule):	\$
22.	Professional expenses (e.g. professional memberships not deducted, journals):	\$
23.	Gifts and donations:	\$
24.	Other expenses (e.g., other expenses of real properties owned not listed above, payments for support of dependents not living at home not already listed, retirement investments (IRA's), counseling, legal fees, and financial/ tax advice) (insert total and specify	\$
<b>TOTAL</b>		<b>\$</b>

### **III. STATEMENT OF DEBTS AND OBLIGATIONS**

<b>Creditor's Name</b>	<b>For</b>	<b>Current Balance</b>	<b>Monthly Payments</b>	<b>Who Pays? (H/W)</b>
<b>TOTAL LIABILITIES</b>		<b>\$</b>	<b>\$</b>	

### **IV. STATEMENT OF ASSETS**

#### **A. HOUSEHOLD ITEMS AND PERSONAL EFFECTS**

<b>Description</b>	<b>Current Value</b>	<b>Basis of Valuation</b>	<b>Owner (H/W)</b>
Furniture, Furnishings			
in W's possession	\$		
in H's possession	\$		
Antiques/Heirlooms	\$		
China, Silver, Crystal	\$		
Jewelry	\$		
Furs	\$		
Object of Art	\$		
Other: (specify)			
	<b>\$</b>		

**B. AUTOMOBILES**

<b>Year</b>	<b>Make</b>	<b>Model</b>	<b>Current Value</b>	<b>Amount Owed</b>	<b>(H/W)</b>

**C. SECURITIES**

<b>No. of Shares</b>	<b>Name of Company</b>	<b>Date Issued</b>	<b>Cert. Number</b>	<b>Current Value</b>	<b>Orig. Cost</b>

**D. CASH AND DEPOSIT ACCOUNTS**

<b>Name of Institution</b>	<b>Type of Account</b>	<b>Acct./Cert. Number</b>	<b>Current Balance</b>	<b>Owner (H/W)</b>

**E. LIFE INSURANCE**

<b>Name of Insured (H/W) Insurance</b>	<b>Face Amount</b>	<b>Cash Value</b>	<b>Beneficiary</b>	<b>Type of Policy</b>	<b>Owner (H/W)</b>

**F. RETIREMENT INTERESTS**

Name of Company	Type of Plan	Value of Interest	% Vested	Owner (H/W)

**G. REAL ESTATE**

Type of Property:	Mortgage Balance:
Address:	Monthly Payment:
Date of Acquisition:	Other Liens: <input type="checkbox"/> Yes <input type="checkbox"/> No
Current Market Value:	To:
Basis and Date of Valuation:	Amount:
Original Cost:	Equity:
Cost of Additions:	Taxes:
Total Cost:	How Title held per deed:

**H. BUSINESS INTERESTS**

Business's Name and Address	Nature of Business	Percentage of Ownership	Value Less Indebtedness	Owner (H/W)

**I. ASSETS DISPOSED OF IN THE YEAR PRIOR TO THE MARRIAGE**

Have you disposed of any assets within the one-year period prior to the filing of the divorce petition, the proceeds of which are not already accounted for in the above representation of assets?

**J. MEDICAL, CASUALTY, DISABILITY AND OTHER INSURANCE**

**K. PROPERTY ACQUIRED BY GIFT OR INHERITANCE**

List and describe any property valued over \$500 that you acquired by gift or inheritance (not from your spouse). Give description, when and how acquired, fair market value at time acquired and at present, and how property is currently held.

**L. PROPERTY OWNED PRIOR TO MARRIAGE**

List and describe any property valued over \$500 and not acquired by gift or inheritance that you owned prior this marriage. Give description, including fair market value at time of marriage and at present and how property is currently held.

**M. ADDITIONAL PERSONAL PROPERTY AND ASSETS:**

List and describe any property valued over \$500 and not acquired by gift or inheritance that are not otherwise described above within any of the specified categories.

**V. LITIGATION**

Are you a party to any other lawsuits?  Yes  No.

If yes, provide details: \_\_\_\_\_  
\_\_\_\_\_

**VI. BANKRUPTCY**

Have you ever filed bankruptcy?  Yes  No.

If yes, provide details: \_\_\_\_\_  
\_\_\_\_\_

\*\*\*\*\*

I declare under penalty of perjury that the foregoing, including my attachments, is true and that this declaration was executed on the \_\_\_\_\_ day of \_\_\_\_\_, 2005, at Milwaukee, Wisconsin.

\_\_\_\_\_  
[client's name]

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