

## INSTRUCTIONS FOR COMPLETING THE FINANCIAL DISCLOSURE STATEMENT

You must compile the court-required Financial Disclosure Statement (FDS) In collaborative and mediation cases, please discuss this with us in advance as it will likely be a joint FDS process. We will discuss the timing (after the case is filed) for gathering financial information to use a consistent valuation date. Please note that the initial FDS is a draft and does not need to be signed. Here are some helpful instructions:

**Income:** Please provide your last four paycheck stubs from each source of employment and let us know how often you are paid (two times per month/every other week, etc.). We will calculate the amount of your gross income and deductions. Write on the statement if you are eligible for bonuses or commissions and how the bonuses are calculated and when paid; include the amounts for the prior year and year-to-date.

Please be sure to include a copy of your last federal and state income tax returns, together with all W-2s, 1099s, and schedules. Please provide a copy of the most recent copy of each of your Social Security Earnings and Benefit Statement (request at [www.ssa.gov](http://www.ssa.gov)). If you need assistance, let us know.

**Statement of Expenses:** Although the statement provides for "husband" and "wife", we need your projected expenses with you and your children, if any, living separately from your spouse. For example, your housing expenses for living separately will be different based upon rent, purchase or refinance. Do not apportion housing or food for the children, but do list any significant expenses such as uninsured medical/dental, clothing, and activities in the children column.

**Statement of Debts:** Please include a copy of your most recent debt statements. Provide a copy of all credit card statements (even if paid in full monthly).

**Household items:** Do not guess resale values. These items are usually divided by agreement. Please do note if there are any items of significant value, and we will discuss those items separately (e.g. art, collectibles).

**Automobiles:** Please go to [www.kbb.com](http://www.kbb.com) and calculate the value of each vehicle using private party value and include the proper year, make, model, condition and mileage. Print out the valuation and include it with your financial documents.

**Investments (securities, bank accounts, retirement assets, and life insurance):** Please provide a copy of the end-of-prior year and most recent statement for each joint or individual account or any account you have closed in the past year.

**Real Estate:** Please complete the information, but no need to include the original cost or the cost of additions. Please provide a copy of the mortgage, deed, or note that sets forth the full legal description of the real estate and a tax bill.

**Please call us promptly with any questions or concerns you may have.** Please return a draft of the FDS along with all the documentation to us. It is ideal to have the information to us within 30 days of the commencement of the action or earlier if there is a temporary hearing, but check with us about what valuation date to use. In collaborative and mediation cases, the process and timetable for gathering information will be discussed at a joint meeting. It is important that you gather all documents above and take your time to make sure that the statement is complete and accurate. Not only is this form the basis for negotiating and finalizing the financial issues of your divorce, but it is a document which you will each eventually finalize and sign under oath swearing that it is true and correct before it is filed with the court.

STATE OF WISCONSIN

CIRCUIT COURT  
FAMILY COURT BRANCH

\_\_\_\_\_ COUNTY

In re the marriage of:

Case No. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Joint Petitioner-Wife,

and

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Joint Petitioner-Husband.

**JOINT PETITIONERS' \_\_\_\_\_ FINANCIAL DISCLOSURE  
STATEMENT**

JOINT PETITIONER-WIFE	JOINT PETITIONER-HUSBAND
Name:	Name:
Address:	Address:
Social Security No.:	Social Security No.:
Birthdate:	Birthdate:
Employer:	Employer:
Occupation:	Occupation:

Date of marriage:  
Date of separation:

Date of filing of summons:  
Date of service of summons:

CHILDREN			
Name	Birthdate	Age	Social Security No.

With whom are children living?

### STATEMENT OF MONTHLY INCOME

Gross Current <i>Monthly</i> Income from:	Husband	Wife
Salary and wages, including commissions, allowances, and overtime, payable	\$	\$
Pension and retirement benefits:		
Social Security:		
Disability and unemployment insurance:		
Public assistance:		
Maintenance/alimony from any prior marriage:		
Child support from any prior marriage:		
Dividends and interest:		
Estates, trusts, royalties:		
Rents:		
Bonuses (annual, semiannual, quarterly):		
All other sources:		
<b>Total Gross Monthly Income:</b>	<b>\$</b>	<b>\$</b>

### MONTHLY DEDUCTIONS FROM GROSS INCOME

	Husband	Wife
No. of exemptions claimed:		
State income taxes:	\$	\$
Federal income taxes:		
Social Security and Medicare:		
Medical or other insurance (describe)		
Union or other dues:		
Retirement or pension fund:		
Mandatory contribution:		
Optional contribution:		
Savings plan:		
Credit union (explain):		
Other (specify):		
<b>Total Monthly Deductions</b>	<b>\$</b>	<b>\$</b>
<b>Net Monthly Income</b>	<b>\$</b>	<b>\$</b>

## STATEMENT OF EXPENSES

Estimated *Monthly* Expenses of Living Apart:

		Husband	Wife
1.	Rent or home mortgage payments:	\$	\$
2.	Real property taxes:		
3.	Real property insurance:		
4.	Maintenance(e.g., home, yard, snow, furnace, appliances, furniture, service contracts):		
5.	Food and household supplies:		
6.	Utilities (water, electric, gas, oil, heat, trash collection):		
7.	Telephone:		
8.	Laundry and cleaning:		
9.	Clothing:		
10.	Medical and drug expenses not covered by insurance:		
11.	Dental expenses not covered by insurance:		
12.	Insurance:		
13.	Child care:		
14.	Payment of child/spousal support re: prior marriage		
15.	School:		
16.	Entertainment:		
17.	Incidentals:		
18.	Transportation (other than automobile):		
19.	Auto expenses:		
20.	Auto payments:		
21.	Installment payments (attach schedule):		
22.	Professional expenses:		
23.	Gifts and donations:		
24.	Other expenses:		
	<b>Total Monthly Expenses</b>	<b>\$</b>	<b>\$</b>

## STATEMENT OF DEBTS AND OBLIGATIONS

Creditor	Property	Current Balance	Monthly Payment	Who Pays

**STATEMENT OF ASSETS**

<u>Description</u>	<u>Current Value</u>	<u>Date of Valuation</u>	<u>Basis</u>	<u>Balance Owed</u>	<u>Owner</u>
Furniture, furnishings					
in W's possession	Unknown				
in H's possession	Unknown				
Antiques/Heirlooms					
China, silver, crystal					
Jewelry					
Furs					
Objects of Art					
Other (specify)					

**AUTOMOBILES**

<b>Year, Make, Model</b>	<b>Current Value</b>	<b>Amount Owed</b>	<b>Owner</b>

**SECURITIES**

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

**CASH AND DEPOSIT ACCOUNTS**

Name of Institution	Type of Account	Account Number	Current Balance	Date	Owner

**LIFE INSURANCE**

Name of Ins. Co.	Insured	Policy No.	Face Amount	Cash Value	Beneficiary	Type of Policy	Owner

**RETIREMENT INTERESTS**

Name of Co.	Type of Plan	ID No.	Value of Interest	Percent Vested	Date of Valuation	Owner

### REAL ESTATE

Type of Property:	Mortgage Balance: \$
Address:	Monthly Payment: \$ To:
Date of Acquisition:	Other Liens:            ( ) Yes            ( ) No
Current Market Value:	To:
Basis and date of valuation:	Amount: \$
	Equity: \$
Original Cost: \$	Taxes (20 ): \$
Cost of Additions: \$	How Title held per deed:
Total Cost: \$	

### BUSINESS INTERESTS

Business' Name and Address	Nature of Business	Percentage of Ownership	Value less Indebtedness	Owner

### MEDICAL, CASUALTY, DISABILITY AND OTHER INSURANCE

Name of Co.	Type of Insurance	Policy No.	Group No.	Date Issued	Owner

**Assets Disposed of and Unaccounted for One Year  
Prior to Filing of Petition for Divorce**

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?

Yes       No

If yes, describe the asset, the date of transfer, to whom it was transferred and the value received, if any:

**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.

**Property Owned Prior to Marriage**

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

**Additional Personal Property and Assets**

**LITIGATION**

Are you a party to any other lawsuits?       Yes       No  
If yes, provide details:



## BANKRUPTCY

Have you ever filed bankruptcy?    ( ) Yes    ( ) No

If yes, provide details:

I declare under penalty of perjury that the foregoing, including any attachments, is true and that this declaration was executed on the \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_, at \_\_\_\_\_, Wisconsin.

\_\_\_\_\_  
Petitioner-Wife

\_\_\_\_\_  
Petitioner-Husband