

MARITAL ASSET and DEBT LIST

ASSETS

1. **Marital Residence:** Most Recent 1099 Statement
 Mortgage Coupon
 Appraisal/real Estate Broker Valuation
 Date Purchased
 Amount/source of down Payment

2. **Vehicles:** VIN Number
 Make/Model/Mileage
 Purchase Price
 Payoff Figure
 Condition of Car (Good/fair/poor)

3. **Life Insurance:** Policy Number
 Owner/beneficiary/insured
 Cash Value Statement
 Name and Address of Agent

4. **Savings Account:** Account #
 Name and Address of Financial Institution
 When Opened
 Current Balance
 Co-owner/signor

5. **IRA Account:** Account #
 Name and Address of Financial Institution
 When Opened
 Current Balance
 Beneficiary/Co-owner

6. **Stocks/Bonds:** Account #
 Name/address of Brokerage and Agent
 When Opened
 Current Balance
 Beneficiary/Co-owner

7. **Furniture:** List with FMV/Appraisal
Separate/Marital/Gift
Location
8. **Artwork:** List with FMV/Appraisal
Separate/Marital/Gift
Location
9. **Jewelry/Guns/
Valuables:** List with FMV/Appraisal
Separate/marital/gift
Location
10. **Safe Deposit Box:** Box #
Co-owner/Co-signor
Name and Address of Financial Institution
11. **Cash:** Location
History
Separate/Marital/Gift
12. **Pension/401K:** Company Account
Owner/Beneficiary
Most Recent Statement
When Started
13. **Other Items:** (i.e., Vacation Home, RV, Boat, Etc.)
14. **Tax Refunds:** Pending or Anticipated
15. **Business Ownership:** Name and Address of Business Entity
Copy of Interest/Stock Shares
Date Purchased
Owner/Co-owner
16. **Income Sources:** Last Three Years' Tax Returns
W-2's & 1099's for Same
Disability/Retirement/Investment Income
Any Other Income

DEBTS

1. **Mortgage:** See Above and Provide Loan Amount
2. **Car Loans:** See Above and Provide Loan Amount
3. **Pension Loans:** See Above and Provide Loan Amount
4. **Other Signature or Personal Loans:** Name/Address of Financial Institution
Loan #
Borrower/co:borrower
When Borrowed
5. **Stock Margin:** Name/Address of Brokerage
Amount
When Incurred
6. **Credit Cards:** Name (Visa, Mc) and Acct #
Primary Cardholder/Authorized Users
Current Amount Due
7. **Household Bills:** Past Three (3) Months
(Either Check Register, Quicken Register or Actual Bills)
8. **Budget:** Includes Bills and All Other Monthly/Quarterly/Yearly Expenses
9. **Miscellaneous:** Indebtedness on Any Other Assets
Payment Coupon
Loan Papers
10. **Separate Property:** List in Detail
Trace w/documentation

CHILDREN'S ACTIVITIES/EXPENSES

1. **Schooling (Private):** Name/address of School
 Tuition/fees Costs (Documentation)
 History of Attendance (How Many Years)
 Extra Costs of Private School
 (Uniforms, Etc.)

2. **Schooling (Public):** School Lunches
 Supplies
 Extra Fees (Fundraising)
 Out-of-Pocket Expenses

3. **Sports/Activities:** Name of Program
 Coach – Name/address/telephone #
 Enrollment Fee
 Uniform Costs
 Tournament Costs/Coaching Expenses

4. **Arts:** Name of Program
 Instructor – Name/address/telephone #
 Tuition/Enrollment Fees
 Performance Expenses

5. **Child Care:** Name/address/telephone # of Provider
 Schedule of Fees and Costs
 Schedule of Child Care Hours Utilized

6. **Budget Expenses:** Clothing
 Personal Hygiene
 Medicine/medical/dental
 Entertainment
 Transportation Costs