



call today 201-604-1921

# Your Friendly Divorce

## Budgetary Guide for Your Friendly Divorce

Dear Client:

The following is an initial asset/liability and budgetary guide to be used in listing assets and beginning the process of a post-divorce budget. It will be helpful to us to review this information and for you and your spouse to begin the process of reviewing assets that will need to be considered in the mediation process. Please complete the following form as best you can. If the question presented is unresolved, please indicate that as an issue to be resolved with the mediator at one of the mediation sessions to follow. Thank you.

### INITIAL INFORMATION

	Spouse 1	Spouse 2
Name		
Current Address		
HomePhone		
Work Phone		
Cell Phone		
Email Address		
Date of Birth		
Gender		

### MARRIAGE

Date of Marriage	
County & State	
Date of Separation (see Definitions)	

Is there a prenuptial or postnuptial agreement? \_\_\_ Yes or \_\_\_ No.



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**PREVIOUS MARRIAGE? (If yes, please complete following):**

Name of Spouse		
Date of Marriage		
Date of Dissolution		
Child Support or Alimony obligation?		

**CHILDREN**

Child # 1	
Full Name	
Date of Birth	
Gender	
Child #2	
Full Name	
Date of Birth	
Gender	
Child #3	
Full Name	
Date of Birth	
Gender	
Special Medical Conditions or other considerations of above children	
Intended Custodial Arrangements	



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## REAL ESTATE

Location	
Description	
Date Acquired	
Purchase Price	
Cost of Improvements	
Fair Market Value	
Balance on Mortgage	
Names and type of ownership	
Describe any "separate property" interest.	
Disposition of property	
Will the property be sold?	
Will one spouse continue to live in the property?	

Other Property	
Description	
Date Acquired	
Purchase Price	
Cost of Improvements	
Fair Market Value	
Balance on Mortgage	
Names and type of ownership	
Describe any "separate property" interest.	
Disposition of property	
Will the Property be sold?	
Does one spouse intend to own the property?	



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## ASSETS

	Husband	Wife	Joint
Savings account (personal)	_____	_____	_____
Checking accounts (personal)	_____	_____	_____
Stocks/bonds/etc. (not retirement)	_____	_____	_____
Retirement plans	_____	_____	_____
Non-term life insurance (cash value)	_____	_____	_____
Automobiles (blue book value)	_____	_____	_____
Boats, Motorcycles	_____	_____	_____
Business banking accounts	_____	_____	_____
Other:	_____	_____	_____
TOTAL ASSETS: _____	_____	_____	_____

## LIABILITIES

	Husband	Wife	Joint
Mortgage	_____	_____	_____
Home equity loan	_____	_____	_____
Auto loan	_____	_____	_____
Credit Cards (V) Visa (M) Mastercard (A) American Express Others	_____	_____	_____
Other loans	_____	_____	_____
TOTAL LIABILITIES: _____	_____	_____	_____



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## A. INVESTMENT ACCOUNTS

Please include any IRA, SEPP, 401k, or 452

\_\_\_\_\_ (Account Balance)  
\_\_\_\_\_ (Institution Name & Address)  
\_\_\_\_\_

\_\_\_\_\_ (Account Balance)  
\_\_\_\_\_ (Institution Name & Address)  
\_\_\_\_\_

\_\_\_\_\_ (Account Balance)  
\_\_\_\_\_ (Institution Name & Address)  
\_\_\_\_\_

## B. SAFTEY DEPOSIT BOXES

\_\_\_\_\_ (Institution Name & Address)  
\_\_\_\_\_  
\_\_\_\_\_ (Box Number & Location of Key)  
\_\_\_\_\_ (Contents)  
\_\_\_\_\_

## C. PENSION PLANS

\_\_\_\_\_ (Account Number)  
\_\_\_\_\_ (Account Balance & vested Amount)  
\_\_\_\_\_ (Institution Name & Address)  
\_\_\_\_\_

\_\_\_\_\_ (Account Number)  
\_\_\_\_\_ (Account Balance & vested Amount)  
\_\_\_\_\_ (Institution Name & Address)  
\_\_\_\_\_

Is there an agreement as to how any of the above may be divided among husband and wife?

Thank you.  
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