

*Last 3 pay stubs
Last 2 tax returns*

HOW TO FILL OUT A FINANCIAL INFORMATION STATEMENT

In any hearing involving child support or temporary spousal support, you will be asked to prepare a financial information statement for the court. So that you will understand how that statement should be completed, we have prepared the following explanation that goes through this statement line by line giving you specific instructions for its preparation.

At the time of the hearing on temporary support, the Court wants to know what your monthly expenses and income are currently. If you have the children, include those expenses, also. Do not include any expenses for your spouse or ex-spouse or anyone who is not living with you. If possible, you need to go back through your checks for at least the previous six-month period and take averages of some specific items in order to present information to the court that will be accurate. Items easily averaged are utilities, telephone bills, gasoline and oil, groceries, and medical bills. Go through and figure out the average cost of each of these items per month for the past six or twelve-month period. Then use the financial information statement to set out those expenses. This will be beneficial to you in that it will show the judge you have been careful and thorough.

Another important principle you should keep in mind when preparing your financial statement is that the more numbers you have on your financial information statement that end in zero, the less believable it will be to the judge. For example, how often do you go out to the grocery store and have the bill for groceries total exactly \$100? Most often the numbers for groceries, utilities, and such are numbers of dollar and odd cents. The judge has the same experience you do. If all of the numbers on your expense sheet that are rounded off, this suggests to the court that it is an estimate or guess and is not, in fact, accurate. One way to achieve odd numbers in situations where you have estimates is to remember that there are 4.3 weeks in each month. Thus, you should multiply your expenses per week by 4.3 weeks. If you do not have access to the documentation to allow you to average expenses over an extended period, let us know and we will advise you on the best method to use to make this Financial Information Statement as accurate as possible.

A. HOUSING

1. House payments/Rent - If you pay rent, just list the rent that you are presently paying on this blank. You might ask whether or not you are going to have an increase in your rent in the foreseeable future. If you have a lease and your lease contract expires soon, you need to find out if there will be an increase in the lease payment or rental payment in the forthcoming year. If the landlord tells you there will be an increase, then you should average-in this increased amount over the next

12 months. If you are still looking for an apartment, find out what the rents are in the area you intend to move to.

We do not want to inflate the payment, but we want the court to know the actual amount you will be paying over the next year. A house payment typically includes interest, principal, taxes and insurance. If your taxes and insurance payments are not included in your monthly mortgage payment, then average them on a monthly basis and include it with your mortgage payment in this category.

2. Utilities - Utilities include gas, water, electricity, and telephone. Please average those expenses for at least six months, preferably longer. Remember that an average of utility costs based upon a six-month average of January through June may be less than the period that includes the hot summer months of July and August. We want to fairly represent to the court what your costs will be. YOU need documentation that shows the court the average costs of utilities for the previous June, July, August, and September. With telephone bills, take an average of at least six months for telephone service so that you arrive at an exact number, and show what the average is for both regular service and long distance service. It is helpful to bring your receipts to Court to prove what those bills have been.
3. Maintenance, repair - Many times expenses are overlooked which belong in this category and are not listed elsewhere. Include the following expenses here:
 - a. yard—including mowing, weeding, trimming, edging, tree service, fertilizing, spraying.
 - b. house—including plumbing, electrical repairs airconditioning, heating, appliance repair and service, lighting, exterminator service, pool, hot tub, burglar alarm, homeowners' association dues.

B. TRANSPORTATION

1. Car payments - Enter the amount of your monthly car payment here. If you have car payment coupons that you send with your payment each month, it is helpful to have a copy of one to show the court, if the need arises. If you have another type of car payment where you pay interest only quarterly, annually or otherwise, calculate the total cost for an entire year and average that figure to show a monthly payment, even though you don't make a monthly payment, since that would be the average

monthly cost to you over a twelve-month period of time. If you lease an automobile, enter the monthly lease payment, and bring any applicable documentation.

2. Car Insurance - Determine what your insurance cost is at present and call your agent to see if the expense will increase. If you have minor children who drive, then determine what it will cost you to insure them also. Break it down and show insurance for you plus insurance for the children to equal total insurance on a monthly basis.
3. Gasoline, oil, maintenance etc.- Try to use one credit card for all of your gasoline, oil, and repairs so it will be easier to determine what your total costs are each month. List your average monthly cost here.
4. Parking, Other - You should include payments for parking, taxis, buses, rental cars, and airline transportation (including costs for vacations). There is no specific line on the form for vacations, but we want to show under "other transportation" an amount which reflects those things. Make a separate, more detailed list to use as back-up information to support the "other transportation" monthly expense you show.

C. INSURANCE

1. Life - If you have life insurance premiums taken out of your pay check, account for this in the itemized "Monthly Income" section. Don't double list this item. If you have a life insurance premium that is not deducted from your pay check, show the monthly cost here.
2. Other - Other insurance could include disability insurance, liability insurance, rental or homeowners insurance, or insurance on antiques or jewelry. It would also include medical and/or dental insurance that is not taken out of your paycheck. Prepare a separate list of the types and amounts of insurance you list under "Other".

- D. GROCERIES - Use an average monthly grocery expense for food and non-food items for each person who lives in your household. The cost for meals eaten outside the home, except for work and school lunches which are separate items on the form, will be listed under "Entertainment". As with all the other items DO NOT GUESS OR ESTIMATE, if at all possible. Base your numbers on actual figures

available to you. It is possible that you might need to factor out food expenses for a new spouse. Discuss this with us to determine if this will be beneficial.

- E. **PERSONAL** - This section of expenses is for those costs for yourself alone. The entertainment expense, for example, does not include the entire cost of taking your children on an outing, but only your portion. However, it does include all babysitting or childcare costs other than that you pay for care of your children while you work. Current child support means child support you pay under a court order for children of a prior marriage who are not living with you. "Other" could include costs of lessons, health club memberships, or any personal expense not included above.
- F. **CHILDREN** - This section is to itemize all those expenses attributable only to your child or children. Under "Child Care", list your average monthly cost for babysitting or daycare so you can work. "Other", may include the expenses of the child's pets, birthday and Christmas gifts, lessons, vacations, trips, tutoring, cable TV, sporting equipment, and many other items that would otherwise not be accounted for.
- G. **MISCELLANEOUS AND OTHER DEBTS** - List all other items which do not appear under any other section. Use a separate sheet if you need more room. For all debts for which you expect to be making payments, state who the payment is made to, NationsBank, MasterCard, Foley's, etc., and the outstanding balance on the line provided, and the anticipated average monthly payment in the dollars column.
- H. **MONTHLY INCOME** - The first part of this section refers only to income from your employment. Your paystubs should contain all the appropriate amounts. Notice, however, that the dollars column is for monthly amounts. Therefore, if you receive a paycheck more often than once a month, you will have to convert the amounts on your paystubs to monthly figures. The current child support item is for listing all child support that you presently receive by court order. List under "Other Income", all additional income you receive from any source, including interest, dividends, rental income, employment bonuses, etc. Do not list income tax refunds, distributions of inheritances or trust funds, proceeds from installment sales or other sales of property, or prepayments of money you have loaned without discussing those items with us first. For all items you list as other income, : itemize the separate sources of the income.
- I. **LIQUID ASSETS** - State in this section all funds that you have the right to use and can have possession of in seven to ten days after you ask for the funds. This includes deposits in checking and savings accounts, but may not include money market funds, certificates of deposit, and other types of time deposits, and cash or securities in brokerage accounts.

It does not include funds in pension or retirement accounts, business accounts receivable or notes receivable.

- J. **SIGNATURE** -You must sign and certify that all the figures are true and correct. You must also be able to swear to the Court, under oath, that the figures are accurate to the best of your knowledge and ability.

NOTICE: This form is to be completed and a copy furnished to opposing Counsel and Court prior to the show cause hearing and/or hearing on the merits. All columns must be totaled.

FINANCIAL INFORMATION SHEET

NO. _____ District Court _____

Petitioner _____

Respondent _____

Attorney for Petitioner _____

Attorney for Respondent _____

1. Date of (marriage) _____ (Separation) _____

2. Ages of children of this marriage : () () () () () () () () () () () ()

3. Necessary Monthly Expenses:

House payment/rent	\$ _____	SUBTOTAL FORWARD:	\$ _____
Utilities including telephone	_____	Clothing	_____
Food	_____	Cleaning and laundry	_____
Doctor/Dentist/Drugs	_____	Legal fees	_____
Insurance premiums	_____	Gifts	_____
Car payments	_____	Church support	_____
Gasoline/oil/parking/bus fares	_____	Entertainment Activities/	_____
Car repairs/maintenance	_____	for children	_____
Child care/school tuition	_____	Miscellaneous	_____
Lunches/school supplies	_____	_____	(+) _____
Haircuts	_____	_____	(+) _____
SUBTOTAL	\$ _____	_____	(+) _____
		GRAND TOTAL	\$ _____

Debts (other than house and car) :

	AMOUNT	MONTHLY PAYMENT
_____	\$ _____	\$ _____
_____	_____	_____
_____ (+)	_____	(+) _____
\$ _____	\$ _____	\$ _____

GRAND TOTAL (monthly expenses and debts) \$ _____

4. Are you working: _____ Kind of work: _____
Name of employer: _____

5. I am paid: (x) weekly, () every two weeks, () twice a month, () once a month. I will get my next check _____.
My hourly rate is \$ _____.

6. Gross Income (if available, attach last three pay stubs): \$ _____

	EACH PAY PERIOD	MONTHLY
Deductions:	\$ _____	\$ _____
Withholding tax	\$ _____	
FICA	_____	
Insurance	_____	
_____	_____	
_____ (+)	_____	
TOTAL DEDUCTIONS:	\$ _____	(-) _____ (-)\$ _____
NET INCOME		\$ _____ \$ _____

7. Other income: (Yes) (NO) Explain: _____

8. Have you received any overtime pay in the last 12 months? (YES) (No)

9. Quick assets: I have or subject to my control:
- | | | | | | |
|------|------------------|------|--------------------|------|------------------|
| \$ 0 | Cash | \$ 0 | Banks | \$ 0 | Savings and loan |
| \$ 0 | Credit Unions | \$ 0 | Undeposited checks | | associations |
| \$ 0 | Stocks and bonds | \$ 0 | Other | | |
- I can borrow \$ 00.00 on my signature.
10. Is your spouse working? (YES) (No) Kind of work: _____
Name of spouse's employer: _____
11. My spouse is paid: () weekly, () every two weeks, () twice a month, (X) once a month.
My spouse's paycheck is received _____.
12. Gross Income (if available, attach spouse's last three pay stubs):
- | | EACH PAY PERIOD | MONTHLY |
|-------------------|-----------------|-----------|
| Deductions: | \$ _____ | \$ _____ |
| Withholding tax | \$ _____ | |
| FICA | _____ | |
| _____ | _____ | |
| _____ | _____ | |
| (+) | _____ | |
| TOTAL DEDUCTIONS: | \$ _____ | (-) _____ |
| NET INCOME | \$ _____ | \$ _____ |
13. Other income: (Yes) (No) Explain: _____

14. Has your spouse received any overtime pay in the last 12 months? (Yes) (No)
15. Quick assets: Spouse has or subject to his/her control:
- | | | | | | |
|------|------------------|------|--------------------|------|------------------|
| \$ 0 | Cash | \$ 0 | Banks | \$ 0 | Savings and loan |
| \$ 0 | Credit Unions | \$ 0 | Undeposited checks | | associations |
| \$ 0 | Stocks and bonds | \$ 0 | Other | | |
- My spouse can borrow \$ 0 by signature.
16. Custody of the children is at present as follows: _____

17. (ANSWER ONLY IF YOU ANTICIPATE RECEIVING CHILD SUPPORT) The following sums are reasonable necessary or within the ability of my spouse to pay, and that it will be fair and equitable to require the following:
- | | EACH PAY PERIOD | MONTHLY |
|--|-----------------|-----------|
| 1. For temporary alimony | \$ _____ | \$ _____ |
| 2. For child support (+) | _____ | (+) _____ |
| 18. Total lines 17a and 17b | \$ _____ | \$ _____ |
| 19. Wife's Net Income (+) | _____ | (+) _____ |
| 20. Total lines 18 and 19 | \$ _____ | \$ _____ |
| 21. Husband's Net Income | \$ _____ | \$ _____ |
| 22. Less alimony and support (Line 18) (-) | _____ | (-) _____ |
| 23. Net husband after deduction of child support and alimony | \$ _____ | \$ _____ |
24. (ANSWER ONLY IF YOU ANTICIPATE PAYING SUPPORT) I feel that a reasonable sum for me to pay weekly or monthly would be:
- | | EACH PAY PERIOD | MONTHLY |
|-----------------------------|-----------------|-----------|
| 1. For temporary alimony | \$ _____ | \$ _____ |
| 2. For child support (+) | _____ | (+) _____ |
| 25. Total lines 24a and 24b | \$ _____ | \$ _____ |

DATE: _____

(Husband)

(Wife)