

## Financial Statement Disclosure Information

This financial statement disclosure is for use in connection with a premarital agreement and should be completed accurately and completely. This statement should contain a full disclosure of all your assets and liabilities. You should initial each page and sign the last page. Your prospective spouse should also sign the last page acknowledging receipt.

Both persons must complete a separate financial statement and provide it to the other party. Two forms are enclosed, one for each party.

This form can be completed in Word or printed and completed by hand.

If you require additional space, please attach additional pages for the sections you need to expand.

# PERSONAL FINANCIAL DISCLOSURE STATEMENT

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To: \_\_\_\_\_

Date: \_\_\_\_\_

## Individual Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Occupation: \_\_\_\_\_

Phone: \_\_\_\_\_

## Current Assets

Cash on Hand or in Banks

Other Cash:

Real Estate (other than residence Schedule A)

Residence

Motor Vehicles (Schedule B)

US Government Securities (Schedule C)

Non-Marketable Securities (Schedule D)

Stocks (Schedule E)

Other Personal Property

Life Insurance Cash Value

Business IRA

Notes Receivable

Other Assets:

Personal IRA

Antiques

Partnership Assets

**Total Assets**

## Current Liabilities

Notes Payable (Secured)(Schedule F)

Notes Payable (Unsecured)(Schedule G)

Real Estate Mortgages Payable (Schedule H)

Auto Loans (Schedule I)

Unpaid Taxes and Interest

Due to Brokers

Open Accounts

Credit Cards (List):

Visa

Other:

Residential Mortgage

**Total Liabilities**

**TOTAL OF ALL ASSETS**

**LESS TOTAL OF ALL LIABILITIES**

**NET WORTH**

## Individual Income Information (Annual)

Salary

Bonus

Commissions

Dividends

Rental Income

Other Income (List):

**Total Income**

## Contingent Liabilities

Guarantor, Co-maker

Lease or Contracts

Legal Claims

Other:

**SCHEDULE "A" REAL ESTATE**

Description of Real Estate	Cost	Market Value	Date Acquired
<b>Totals</b>			

**SCHEDULE "B" MOTOR VEHICLES**

Description of Motor Vehicles	Cost	Value
<b>Totals</b>		

**SCHEDULE "C" U.S. GOVERNMENT SECURITIES**

Description of Stock or Bond	Date Acquired	Par Value	Market Value
<b>Totals</b>			

**SCHEDULE "D" NON MARKETABLE SECURITIES**

Description	Date Acquired	Par Value	Market Value
<b>Totals</b>			

**SCHEDULE "E" STOCKS**

Company	Shares	Date Acquired	Par Value	Market Value
<b>Totals</b>				

**SCHEDULE "F" NOTES PAYABLE SECURED**

Description	Date	Balance	Payment (m/yr)
<b>Totals</b>			

**SCHEDULE "G" NOTES PAYABLE UNSECURED**

Description	Date	Balance	Payment (m/yr)

**SCHEDULE "H" REAL ESTATE MORTGAGES**

Description	Date	Balance	Payment (m/yr)
<b>Totals</b>			

**SCHEDULE "I" AUTO LOANS**

Description	Date	Balance	Payment (m/yr)
<b>Totals</b>			

CERTIFICATION TO FINANCIAL STATEMENT

I certify this Statement to be true and correct as of the date indicated; that this financial statement is a full and fair disclosure of my assets; and that I provided a true and correct copy of this financial statement to \_\_\_\_\_ on \_\_\_\_\_.

\_\_\_\_\_  
Signature

Date: \_\_\_\_\_

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I \_\_\_\_\_ acknowledge receipt of this financial statement and disclosure.

\_\_\_\_\_  
Signature

Date: \_\_\_\_\_

# PERSONAL FINANCIAL DISCLOSURE STATEMENT

\*\*\*\*\*

To: \_\_\_\_\_

Date: \_\_\_\_\_

## Individual Information

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Occupation: \_\_\_\_\_

Phone: \_\_\_\_\_

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Notes Receivable

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Partnership Assets

**Total Assets**

### Current Liabilities

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Notes Payable (Unsecured)(Schedule G)

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**Total Liabilities**

**TOTAL OF ALL ASSETS**

**LESS TOTAL OF ALL LIABILITIES**

**NET WORTH**

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Other Income (List):

**Total Income**

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Guarantor, Co-maker

Lease or Contracts

Legal Claims

Other:



**SCHEDULE "F" NOTES PAYABLE SECURED**

Description	Date	Balance	Payment (m/yr)
<b>Totals</b>			

**SCHEDULE "G" NOTES PAYABLE UNSECURED**

Description	Date	Balance	Payment (m/yr)

**SCHEDULE "H" REAL ESTATE MORTGAGES**

Description	Date	Balance	Payment (m/yr)
<b>Totals</b>			

**SCHEDULE "I" AUTO LOANS**

Description	Date	Balance	Payment (m/yr)
<b>Totals</b>			



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\_\_\_\_\_  
Signature

Date: \_\_\_\_\_

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I \_\_\_\_\_ acknowledge receipt of this financial statement and disclosure.

\_\_\_\_\_  
Signature

Date: \_\_\_\_\_