

## 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

\*\*\*\*\*

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

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

## Individual Information

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Occupation: \_\_\_\_\_  
 Phone: \_\_\_\_\_

### Current Assets

### Current Liabilities

Cash on Hand or in Banks		Notes Payable (Secured)(Schedule F)	
Other Cash:		Notes Payable (Unsecured)(Schedule G)	
Real Estate (other than residence Schedule A)		Real Estate Mortgages Payable (Schedule H)	
Residence		Auto Loans (Schedule I)	
Motor Vehicles (Schedule B)		Unpaid Taxes and Interest	
US Government Securities (Schedule C)		Due to Brokers	
Non-Marketable Securities (Schedule D)		Open Accounts	
Stocks (Schedule E)		Credit Cards (List):	
Other Personal Property		Visa	
Life Insurance Cash Value			
Business IRA			
Notes Receivable			
Other Assets:		Other:	
Personal IRA			
Antiques			
Partnership Assets		Residential Mortgage	
		<b>Total Liabilities</b>	
		<b>TOTAL OF ALL ASSETS</b>	
		<b>LESS TOTAL OF ALL LIABILITIES</b>	
		<b>NET WORTH</b>	
<b>Total Assets</b>			

### Individual Income Information (Annual)

Salary			
Bonus			
Commissions			
Dividends			
Rental Income			
Other Income (List):			
<b>Total Income</b>			

### 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: \_\_\_\_\_

=====  
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: \_\_\_\_\_

Current Assets	Current Liabilities
----------------	---------------------

Cash on Hand or in Banks	Notes Payable (Secured)(Schedule F)
Other Cash:	Notes Payable (Unsecured)(Schedule G)
Real Estate (other than residence Schedule A)	Real Estate Mortgages Payable (Schedule H)
Residence	Auto Loans (Schedule I)
Motor Vehicles (Schedule B)	Unpaid Taxes and Interest
US Government Securities (Schedule C)	Due to Brokers
Non-Marketable Securities (Schedule D)	Open Accounts
Stocks (Schedule E)	Credit Cards (List):
Other Personal Property	Visa
Life Insurance Cash Value	
Business IRA	
Notes Receivable	
Other Assets:	Other:
Personal IRA	
Antiques	
Partnership Assets	Residential Mortgage
	<b>Total Liabilities</b>
	<b>TOTAL OF ALL ASSETS</b>
	<b>LESS TOTAL OF ALL LIABILITIES</b>
	<b>NET WORTH</b>
<b>Total Assets</b>	

## Individual Income Information (Annual)

Salary	
Bonus	
Commissions	
Dividends	
Rental Income	
Other Income (List):	
<b>Total Income</b>	

## 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: \_\_\_\_\_

---

---

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

\_\_\_\_\_  
Signature

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