

## 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

### 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 "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

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

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

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

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|----------------|---------------------|
|----------------|---------------------|

|   |  |
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| 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)

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|----------------------|--|
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|                      |  |
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|                     |  |
|---------------------|--|
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Signature

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

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

\_\_\_\_\_  
Signature

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