

FINANCIAL DECLARATION

WHAT IS IT AND WHEN IS IT REQUIRED

- Required when finances are in issue, i.e. child support and alimony amounts,
- Opposing counsel will use this document to determine what assets and debts you acknowledge, and we will use this during the discovery process.
- You must fill this out honestly, accurately, and to the best of your ability.
- You are not required to complete the other side's information.

DOCUMENTS NEEDED TO COMPLETE

- Your last four pay stubs;
- Personal tax returns for you and your spouse for the last year;
- Last four mortgage statements;
- Last four retirement account statements;
- Last six months' banking and credit card statements;
- Stocks, bonds, mutual funds, and equities statements; and
- Descriptions of your and your spouses' employee benefits.
- If a business is involved:
 - Tax returns
 - Profit/loss statements
 - Statements from bank accounts for business
 - Brokerage statements or
 - Corporate minute books.

OTHER NOTES

- We are not financial professionals and cannot advise you on such matters.
- Since this document must be notarized, you are considered under oath when filling this out.
- There are instructions on the last page, but if you need additional help, we suggest you contact your tax preparer, CPA, accountant, or another financial professional.
- If your financial declaration is completed incorrectly, this could negatively impact the outcome of your case.