



HOW TO FILL OUT THE NET WORTH STATEMENT

One (1) form per person

- **Decide who will be the Plaintiff and Defendant** so it aligns on each of your forms. In an uncontested divorce no blame needs to be assigned.

Five (5) sections:

- **Budget/Cash flow – Pages 3-8**
- **Income – Page 9**
- **Assets – Pages 11-20**
- **Liabilities – Pages 21-25**
- **Signature Page 26 (Wait to sign with a notary)**

Use the Rider on the back of the form for anything that does not fit in the main form

Complete the worksheet to the best of your ability. We will review it together for completion. The form is a fillable pdf. Fill out the first page and save it to your device. Open it back up to make sure it saved your information. If it saved, you can continue. If it did not save your information, print out a hard copy and fill it in by hand. **Neatly handwritten forms may be submitted.**

If an item does not apply enter a “0” for an amount.

If you don't have exact amounts do your best to accurately estimate amounts in both the expenses section and the assets/liabilities sections.

Budgets (page 3–8) should be filled out as ESTIMATED FUTURE BUDGETS for when you are living separately (if you are not already living separately).

Provide Current Balances. If you **did not** commence an action for divorce, **DO NOT fill out the Commencement Date values.** Fill out Current Values **ONNLY**. Use values from the agreed to date you and your spouse have decided on (**VALUATION DATE**). Most couples in mediation do not commence an action for divorce prior to mediation.

Some information may need to be listed more than once - (ex. auto loan) gets listed in the expense section, the liability section for Vehicles and the liability section under “other liabilities” for the amount of the loan.

BE SURE TO ADD UP EACH SECTION OF THE FORM AND INCLUDE TOTALS.



Collect the Following:

- a. 2-3 most recent pay statements *
- b. Most recent W-2's or other proof of income*
- c. Most recent personal tax return (business tax return, if applicable)*
- d. Prenuptial or Postnuptial agreement, if applicable*
- e. Retainer agreement for legal representation, if applicable*
- f. Mortgage statement/other loans on property – showing balance/monthly payment
- g. Credit card statements or print out online statement – most recent (individual/joint)
- h. Bank account statements or print online statement – must show balance of accounts, individual and joint
- i. Investment account statements
- j. Whole and or term life insurance policies
- k. Retirement accounts: Pension, 401K, 403-b, IRA's, etc. – statement showing most recent balance (If you have a pension, please provide the Summary Plan Description (SPD))
- l. Loans – statements showing balance on remaining loan (auto, student, personal)
- m. Copy of your health insurance card – costs for participant and child(ren)
- n. Car Values (if you own) – Use kbb.com to look up private party sale for vehicle

***Must be provided to go in with your paperwork when filed. Other items may not be necessary. Check with your mediator.**

If there is potential SEPARATE PROPERTY - Property not acquired during the marriage or an inheritance or personal injury award) (documents may be needed, listed below):

- **Provide statements from the date of marriage for any accounts that are applicable and that had balances prior to the marriage.**
- **Provide statements for inheritances received during the marriage.**
- **Closing statements for property in which separate property was used**

Credit Report

To check your individual credit report, visit www.annualcreditreport.com

This will allow you to be sure all your liabilities are reported and correct.