

# IN THE CIRCUIT COURT OF \_\_\_\_\_

| Judge or Division:                         | Case Number: |
|--------------------------------------------|--------------|
| In RE the Marriage of :<br>Petitioner:     |              |
| SSN (last four digits): vs.<br>Respondent: | _            |
| SSN (last four digits):                    |              |

(Date File Stamp)

# Statement of Marital and Non-Marital Assets and Debts

## Name of submitting party \_\_\_\_\_

## Address of submitting party \_\_\_\_\_

If there is not sufficient room on this form, supplement each answer by attaching additional sheets as needed. Show only dollar amounts rounding to the nearest dollar.

## I. <u>MARITAL PROPERTY\*</u>

- Marital Property means all property acquired by either spouse subsequent to the marriage except;
- 1. Property acquired by gift, bequest, devise, or descent;
- 2. Property acquired in exchange for property acquired prior to the marriage or in exchange for property acquired by gift, bequest, devise, or descent;
- 3. Property acquired by a spouse after a decree of legal separation;
- 4. Property excluded by valid written agreement of the parties; and
- 5. The increase in value of property acquired prior to the marriage or pursuant to subdivisions (1) to (4) above, unless marital assets, including labor, have contributed to such increases and then only to the extent of such contributions.

| A. <u>REAL ESTATE</u> – List interest in real estate including leaseholds. Include address, legal description, names of mortgagor(s) or lessor(s). | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who Presently<br>Possesses<br>Husband or<br>Wife |
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| <b>B.</b> <u>MOTOR VEHICLES</u> – Include all<br>automobiles, boats, trailers, aircraft, recreational<br>vehicles and campers. List year, make, model,<br>vehicle identification number and names of<br>mortgagors. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who Presently<br>Possesses<br>Husband or<br>Wife |
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| C. <u>BANK ACCOUNTS</u> – List all checking and<br>savings accounts, time deposit, money markets,<br>certificates, etc. held in your name alone or in<br>your name and another person. Give the names of<br>the institutions, the names on the accounts and<br>the account numbers. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who Presently<br>Possesses<br>Husband or<br>Wife |
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| D. <u>CASH ON HAND</u> | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who Presently<br>Possesses<br>Husband or<br>Wife |
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| <b>E.</b> <u>SECURITIES</u> – List all stocks, both public<br>and closely held corporations, bonds, promissory<br>notes, mortgages, money market funds and all<br>other property in which you have an interest.<br>Give names in which securities are held and<br>identification numbers. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| <b>F.</b> <u>LIFE INSURANCE</u> – List the type of policy, name of issuing company, policy number, owner of policy, insured, beneficiaries, face value and cash value (include policies furnished by your employer). | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| G. <u>HOUSEHOLD GOODS &amp; PERSONAL</u><br><u>GOODS</u> – Below or on a separate sheet, list all<br>household goods, and personal goods, including<br>all appliances, furniture, silver, antiques, art<br>collectibles, televisions, stereos, clothing,<br>jewelry, furs, cameras, coin and stamp<br>collections, tools, firearms, sporting equipment,<br>lawn and garden equipment, etc. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| HOUSEHOLD GOODS & PERSONAL<br>GOODS - continued | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| H. <u>RETIREMENT, PENSION AND/OR</u><br><u>PROFIT SHARING</u> – List the name of the<br>company, the person holding the interest, the<br>percentage vested, and the present total value. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| <b>I.</b> <u>INTEREST IN TRUST</u> – List any interest in a trust. Give name of the trust, name of the trustee, settlor, beneficiaries, nature of the interest you have in the trust and attach to this statement a copy of the trust instrument. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| J. <u>INTEREST IN CONTRACTS MADE AND</u><br><u>NOT PERFORMED</u> – List the parties to the<br>contract, your interest in the contract and the<br>expected date of performance, if any. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| K. <u>INTEREST IN PENDING LITIGATION</u><br><u>OR SUIT NOT YET FILED.</u> | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| L. <u>INTEREST IN FARM EQUIPMENT,</u><br><u>CROPS, ANIMALS</u> – List the nature of the<br>property and location. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| M. <u>DEBTS OWED TO YOU BY OTHERS</u> –<br>List the name of the debtor, any security, date of<br>loan and due date, if any. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| N. INTERESTS IN SOLE<br>PROPRIETORSHIPS, PARTNERSHIPS, OR<br>JOINT VENTURES – List the percent interest<br>you hold. | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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| <b>O.</b> <u>OTHER ASSESTS</u> – List all assets not already listed herein. (Note who has possession of these items.) | Present Fair<br>Market<br>Value | Amount<br>Owed | Equity | Recommended<br>Award to Husband<br>or Wife | Who<br>Presently<br>Possesses<br>Husband or<br>Wife |
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## II. NON-MARITAL PROPERTY:

Property owned since before the marriage, and property acquired after the marriage:

- 1. By gift, bequest, devise, or descent;
- 2. In exchange for property acquired prior to the marriage or in exchange for property acquired by gift, bequest, devise, or descent;
- 3. By a spouse after a decree of legal separation; and
- 4. By valid written agreement of the parties.

For each item of non-marital property, indicate how acquired and approximate date of acquisition.

| Item | Present Value | Amount<br>Owed | Equity | Alleged Owner Husband<br>or Wife |
|------|---------------|----------------|--------|----------------------------------|
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## III. <u>DEBTS:</u>

List all loans from any bank, credit union, savings and loan association or other lending institution. Indicate who signed the loan, the date of the loan, actual disposition of the proceeds and state the name and address of the lender. Also list all credit card balances and store charges. State whose name is on the credit card. Also list all other indebtedness and give the name and address of the creditor.

| Creditor | Current<br>Balance | Secured<br>Yes/No | Required<br>Monthly<br>Payment | Indicate Debt<br>Incurred by<br>Husband, Wife, or<br>Joint |
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|       |                                                                            | Summa                             | ry                         |                                           |
|-------|----------------------------------------------------------------------------|-----------------------------------|----------------------------|-------------------------------------------|
|       |                                                                            | VALUE                             | DEBT                       | EQUITY                                    |
| [. Ma | arital Property:                                                           |                                   |                            |                                           |
| А.    | Real Estate                                                                |                                   |                            |                                           |
| B.    | Motor Vehicles                                                             |                                   |                            |                                           |
| C.    | Bank Accounts                                                              |                                   |                            |                                           |
| D.    | Cash on Hand                                                               |                                   |                            |                                           |
| E.    | Securities                                                                 |                                   |                            |                                           |
| F.    | Life Insurance                                                             |                                   |                            |                                           |
| G.    | Household Goods &<br>Personal Goods                                        |                                   |                            |                                           |
| H.    | Retirement, Pension<br>and/or Profit Sharing                               |                                   |                            |                                           |
| I.    | Interest in Trust                                                          |                                   |                            |                                           |
| J.    | Interest in Contracts<br>Made & Not Performed                              |                                   |                            |                                           |
| K.    | Interest in Pending<br>Litigation or Suit not yet<br>Filed                 |                                   |                            |                                           |
| L.    |                                                                            |                                   |                            |                                           |
| M.    | Debts Owed to You by<br>Others                                             |                                   |                            |                                           |
| N.    | Interest in Sole<br>Proprietorships,<br>Partnerships, or Joint<br>Ventures |                                   |                            |                                           |
| 0.    | Other Assets                                                               |                                   |                            |                                           |
| I.    | Non-Marital Property                                                       |                                   |                            |                                           |
| II.   | Debts                                                                      |                                   |                            |                                           |
|       | TOTALS                                                                     |                                   |                            |                                           |
|       |                                                                            | Affidav                           |                            |                                           |
| acc   | I certify under penalty of perjur<br>urate to the best of my knowledg      |                                   | ital and Non-Marital Prope | rty and Liabilities is complete, true and |
|       |                                                                            |                                   |                            | Affiant                                   |
| Sub   | oscribed and sworn to before me,                                           | the undersigned Notary Public, on |                            | (date)                                    |
| Му    | Commission Expires:                                                        |                                   |                            |                                           |
|       | Date                                                                       |                                   |                            | Notary Public                             |