

Financial Worksheet Instructions

This packet contains the following worksheets: Financial Accounts; Debt Accounts; Real and Personal Property; and Child Support. These worksheets will help you gather all financial information necessary to file for divorce. **Read these instructions prior to filling out the worksheets.**

1. Fill out these worksheets to the best of your ability. If you do not know something or do not know how to find the information, don't worry about it. We will discuss how to obtain the information during our meeting.
2. The more information you can fill out, the more efficient our meeting will be. However, it is not necessary to postpone a meeting if you cannot fill this out prior to the meeting – it is fine to submit it after the meeting.
3. If something does not apply to your case, just cross it out or leave it blank. Be sure to submit ALL pages even if some pages do not apply to you.
4. If you have the exact financial amount information, include it. If you do not have exact figures, just use approximate figures.
5. Important: Do not try to decide who gets what unless both of you agree! We will discuss distribution of all assets and debts in our meeting – that's what the mediation is for.
6. If you need more space to enter information you can either attach a blank sheet or print a second copy of the applicable worksheet and fill that out.

After you have filled out the worksheets you can either: 1) bring them with you to our next meeting; 2) scan and email the documents to jon@bermanlawcenter.com; or 3) fax the documents to (503)200-2891.

Clients: _____

Financial Account Worksheet

All financial accounts need to be identified and divided. Use this worksheet to identify all financial accounts, including but not limited to: savings accounts; checking accounts; brokerage (stock) accounts; retirement accounts (401k, PERS, IRAs, deferred compensation accounts, etc.); CD's; and money market accounts. *Do not divide the financial accounts now unless you have both agreed to the division – we will do that in mediation.*

<u>Asset</u>	<u>Amount</u>	<u>Name on Acct</u>	<u>Last 4 of Acct</u>
<i>Example: Key Bank checking</i>	<i>\$690</i>	<i>Wife</i>	<i>2489</i>
<i>Example: Ameritrade IRA</i>	<i>\$27,600</i>	<i>Both</i>	<i>6521</i>

Bank Accounts

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Retirement Accounts

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Brokerage Accounts (stocks, etc.)

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Misc. Financial Assets

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Debt Worksheet

All debts need to be identified and divided. Use this worksheet to identify all debts, including but not limited to: first and second mortgages; home equity lines of credit; auto loans; student loans; credit cards; personal loans; and tax debts. You do not need to list utilities, phone bills or other similar monthly payments. *Do not divide debts now unless you have both agreed to the division – we will do that in mediation.*

Debt	Amount	Name on Acct	Last 4 of Acct
<i>Example: Chase Credit Card</i>	<i>\$3,200</i>	<i>Husband</i>	<i>5982</i>
<i>Example: Wells Fargo 2nd Mtg.</i>	<i>\$45,000</i>	<i>Both</i>	<i>3786</i>

Real Property Loans

Credit Cards

Auto Loans

Student Loans

Misc. Debts

Real Property Worksheet

Fill this information out to the extent known. The legal description of the property can usually be found on your property tax statement and will look something like, "Block 6, Lot 14 of Witham Hill."

Property 1: _____

Address: _____

Legal Description: _____

Who is on the title?	Husband	Wife	Both		
Who is on the 1 st mortgage?	Husband	Wife	Both	N/A	Payment: _____
Who is on the 2 nd mortgage?	Husband	Wife	Both	N/A	Payment: _____
Who is on the HELOC?	Husband	Wife	Both	N/A	Payment: _____

Property 2: _____

Address: _____

Legal Description: _____

Who is on the title?	Husband	Wife	Both		
Who is on the 1 st mortgage?	Husband	Wife	Both	N/A	Payment: _____
Who is on the 2 nd mortgage?	Husband	Wife	Both	N/A	Payment: _____
Who is on the HELOC?	Husband	Wife	Both	N/A	Payment: _____

Personal Property Worksheet

As part of your divorce agreement you must identify and award all vehicles for which there is a title, such as cars and trucks, boats, ATVs, travel trailers, etc. Additionally, you can specify how you want to divide other household items of personal property (or, if you prefer, the judgment can just indicate that each person keeps whatever items of personal property are currently in their possession.

Required: Vehicles (Year, Make, Model, Whose name is the title in)

Optional: Misc. Items of Personal Property

Child Support Worksheet

In Oregon child support is computed using the Oregon Child Support Guidelines. It is possible for the parties to reach an agreement that support will be more or less than the guideline amount. However, the guideline amount will be used if no other agreement can be reached. The following information is required to calculate the guideline support amount.

Number of children under age 18 from this relationship: _____

Number of children between the ages of 18 and 21 from this relationship: _____

Number of children under age 21 from a different relationship: _____

Husband's gross income per pay period: _____

How often is husband paid: Weekly Every two weeks Bi-monthly Monthly

Does husband receive bonuses, and if so, how much and how frequently: _____

Wife's gross income per pay period: _____

How often is wife paid: Weekly Every two weeks Bi-monthly Monthly

Does wife receive bonuses, and if so, how much and how frequently: _____

Cost of daycare: _____

Who provides health insurance: _____

How much does it cost JUST to cover the parent providing health insurance: _____

How much does it cost JUST to the children: _____

Have you agreed to a support amount already, and if so, how much: _____