

WORKSHEET FOR FINANCIAL INFORMATION STATEMENT

You are required to file a "financial information sheet" that will aid the court in assessing support. The *Financial Information Statement* must show the court your current financial situation. You need to include all monthly expenses including expenses you are paying for your spouse and/or child(ren).

General Information

When determining values for each monthly expense, it is helpful for you to look at your checkbook and credit card/bank statements. Even if your spouse is paying the "big" ticket items such as the house mortgage and car payments, you need to check your expenditures because recurring payments usually indicate a "regular" and customary expense of your household.

Please be careful not to categorize a payment in two places. If you do this, it will look like you are dishonest and trying to pad your monthly expenses for your benefit. Opposing counsel will question you about these expenses, so it is extremely important that you are careful in listing your expenses. If you make a mistake, you need to apologize to the court and move on. However, you can avoid that embarrassment if you take time to carefully fill out your monthly expenses. Also, you need to go over this *Financial Information Statement* with your attorney BEFORE the hearing, preferably not at the courthouse.

This worksheet explains each item under the "necessary monthly expenses" and "other debts" sections of the *Financial Information Statement*. Please take time and think about your regular expenses as follows:

Necessary Monthly Expenses:

House Payment/Rent

Please include your monthly mortgage payment for your house, your monthly rent for your apartment, or both, if applicable. Does the mortgage amount include insurance, taxes, monthly assessment dues, and association dues? If not, please add such costs to your monthly expenses to accurately show the court the expenses that you incur.

Utilities

Remember to include all of your household utilities, including the electric bill, water bill, natural gas bill, cable bill, internet service fees, cell phone and beeper fees, and lawn and pool maintenance expenses. Everything that you can legitimately tie into the physical maintenance of the household should be included under "utilities." If you do not have a monthly bill, the cost should be annualized over a twelve-month period to arrive at the average monthly cost.

Food

This category would include the monthly grocery bill as well as your usual restaurant bill. It may be helpful to review your credit card charges for grocery shopping and restaurant expenditures because most people do not realize their true expenditures for food each month. Please be realistic on this expense category.

Doctor/ Dentist/etc.

List uninsured medical expenses you pay for your family including, co-pays, over-the-counter drugs, therapy sessions, as well as any expense that is clearly out-of-pocket such as an insurance deductible. Remember to include uninsured dental expenses, including orthodontics work. If you, or a family member, have a few trips for dental work during the year, calculate the total divide by 12 for the monthly expense. If you or your children are in need of dental work, please have the estimate available.

Insurance Payment

Health insurance premiums and life insurance premiums should be included in this category. This amount included only if it is in excess of what is already deducted from your paycheck.

Car Payments

If you pay for your car, your spouse's car, a teenager's car, or collegian's car, please state the monthly payments. **DO NOT COUNT THE COMPANY CAR.** If you pay car insurance, include the monthly premium. If you pay annually or quarterly, break the car insurance cost down to a monthly cost.

Gas/Oil/Parking

Include all of your expenses for gasoline, oil changes, and parking expenses that you pay each month, including your car, your spouse's car, a teenager's car, or collegian's car, if applicable.

Car Maintenance

Remember to include maintenance of your automobiles such as brake work, tires, tune-ups, etc. However, be reasonable, the judge may become suspicious if you have a relatively new car that needs a lot of maintenance. This category is usually more applicable for older automobiles.

Child Care/School

Costs for the nanny, babysitter, or day care facility. If your spouse is paying this expense, please list the amount with a notation that your spouse pays this expense. This expense will be a concern of the court, so please provide this information. Please do not include the summer camp in this expense category.

Tuition

If your child(ren) attend(s) a private school, please state the tuition that you pay per month. If you have paid a lump sum for the school year, divide the annual tuition by 12 to arrive at the monthly amount. Again, if your spouse is paying this expense, please list the amount with a notation that your spouse pays this expense. This expense will also be a concern of the court, so please provide this information. Please do not include the summer camp in this expense category; however, feel free to include any regular expenses associated with a college age child that you are paying, and simply use an "*" and explanation.

Lunches/Supplies

This category includes the cost of school lunches and school supplies. If your child(ren) take(s) lunch to school, please do not include the cost if already calculated in monthly "food" expenses.

Haircuts

If you pay for haircuts/ hair styling/ hair coloring, for you, your spouse, or your children, please list the average monthly expense. Although such expenditures may not be a monthly expense, the cost should be annualized over a twelve-month period to arrive at the monthly cost

for the financial information statement. If this category is a large expenditure, please provide an itemized list of each expense.

Clothing

This category includes your clothing, shoes, and accessories and the child(ren)'s attire, if applicable. Remember to calculate all attire, for example, do not forget the cost of child(ren)'s athletic shoes.

Cleaning/Laundry

Please do not forget the dry cleaning bill, if applicable. Even if you do not have your clothes dry cleaned regularly, please estimate your monthly dry cleaning bill by considering how much you spend per year. Also, if you pay to have your clothes laundered or pressed, please include that monthly expenditure.

Legal Fees

If you have paid a large retainer, this number will not be considered by the court. However, if you are paying about the same each month, you may put an average payment down, just be reasonable/ accurate with this figure.

Gifts

Please estimate how much you spend on gifts including birthday gifts, holiday gifts, etc.

Church Support

If you are going to list a monthly church support amount, it is preferable that you only pay what you have in the past. For example, if you have paid \$200 a month to the church, it looks suspicious in litigation to start paying \$400.

Entertainment/Activities for Children

This expense category includes green fees for golf, theater tickets, movie tickets, movie rentals, museum tickets, trips, etc. Please make a separate list for your child(ren), if applicable, including birthday parties, allowance, toys, etc.

Miscellaneous

Any other expense that you incur, please list in this category. For example, if you have an EZ Tag for toll road travel, include the monthly cost in this category. When in doubt, please list the expense on the financial information statement. The categories listed may overlook other necessary expenses that would include extracurricular activities of the children (dance, piano). If you belong to a club, either health or country club, please include any membership dues.

Debts, in addition to Necessary Monthly Expenses:

For Section 9 of the financial information statement, itemize your credit cards including the balance owed and the minimum monthly payment for each credit card. Also, list any outstanding loans and the monthly payment for each, if not listed in the categories above. In the event you pay items listed above with a credit card, make the judge aware of this by placing an "*" with an explanation.

Financial Information Statement for Petitioner/Respondent

- 1. Date filed:.....
- 2. Child:
- 3. Gross monthly earnings from primary employment:
- FICA and Medicare.....
- 401(k)/Retirement.....
- Federal Income Tax Withholding.....
- Total deductions.....
- Net income per month:**

4. **Necessary monthly living expenses:**

HOUSING:

- a. Home Mortgage or Rent
- b. Insurance (Renters/Owners policy).....
- c. Electric Utility.....
- d. Water Utility
- e. Gas Utility.....
- f. Telephone (including cell phone)
- g. Garbage and Sewer
- h. Landscaping & Maintenance
- i. Cable/Internet.....
- Subtotal:**.....

VEHICLE AND TRANSPORTATION

- a. Car payment
- b. Vehicle Insurance.....
- c. Gasoline
- d. Maintenance and Repair
- e. Other Transportation- EZ Tag
- Subtotal:**.....

PERSONAL INSURANCE:

- a. Life, Medical, Dental & Health Insurance.....
- Subtotal:**.....

FOOD, CLOTHING AND PERSONAL:

- a. Groceries
- b. Restaurant Meals.....
- c. Haircuts, grooming
- d. Entertainment.....
- e. Childcare.....
- Subtotal:**.....

HEALTH CARE: (Not paid by Insurance)

- a. Physicians/Hospital/Medical.....
- b. Dentists

Subtotal:

DEBTS: (exclude house mortgage and car payments):

- a. Credit Card.....
- b. Student Loans.....

Subtotal:

TOTAL Monthly Expenses:

SIGNED on _____.

Petitioner/Respondent