

STATE OF VERMONT

SUPERIOR COURT
Unit

FAMILY DIVISION
Case No.

Empty rectangular box for case information.

Table with columns: Plaintiff Name, DOB, V., Defendant Name, DOB.

FINANCIAL AFFIDAVIT
(400-813B)
Property and Assets

I am: [ ] Plaintiff [ ] Defendant [ ] Other: \_\_\_\_\_

Form with fields: Name, Street Address, Mailing Address (if different from Street Address), Town/City, State, Zip, Phone Number (day), Phone Number (evening), Email Address.

INSTRUCTIONS: You are required to complete and file the 813B if-

- 1. You are a party in a newly filed divorce, civil union dissolution, legal separation or annulment and you and the other party have minor children; OR
2. You are ordered by the Court to complete and file this form or the other party requests that you fill out the form as part of the discovery process.

DEADLINE FOR FILING: This form must be filed with the court before or at your first case manager's conference. If no conference is scheduled it must be filed at least seven (7) days before your first scheduled court hearing.

YOU MUST SEND A COPY OF YOUR COMPLETED FORM TO THE OTHER PARTY AT THE SAME TIME YOU FILE IT WITH THE COURT.

I declare that the information provided is true and accurate to the best of my knowledge and belief. I understand that if the information provided is false, I will be subject to the penalty of perjury or to other sanctions in the discretion of the court.

Date: \_\_\_\_\_

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

## SUMMARY OF ASSETS

Check each box that applies to you or the other party

### REAL ESTATE: *(primary residence, camps, land, timeshares, etc.)*

I have an interest in (own) real estate either individually or jointly with another.

Yes  No

The other party has/may have an interest in (own) real estate either individually or jointly with another.

Yes  No

### PERSONAL PROPERTY: *(furniture, antiques, jewelry, electronics, etc.)*

I own personal property

Yes  No

The other party owns/may own personal property

Yes  No

### VEHICLES: *(cars, trucks, ATV's, boats, motorcycles, campers, etc.)*

I own vehicles either individually or jointly.

Yes  No

The other party owns/may own vehicles either individually or jointly

Yes  No

### BANK ACCOUNTS:

I have bank accounts either individually or jointly.

Yes  No

The other party has/may have bank accounts either individually or jointly.

Yes  No

### INVESTMENTS: *(stocks, bonds, mutual funds, trusts, annuities)*

I own investments either individually or jointly.

Yes  No

The other party owns/may own investments either individually or jointly.

Yes  No

### RETIREMENT ACCOUNTS *(IRA, 401 K, pensions, deferred compensation, etc.)*

I own retirement accounts.

Yes  No

The other party owns/may own retirement accounts.

Yes  No

### LIFE INSURANCE POLICIES:

I have life insurance.

Yes  No

The other party has/may have life insurance.

Yes  No

### BUSINESSES:

I own or have an ownership interest in a business.

Yes  No

The other party owns/may own an interest in a business.

Yes  No

## TRANSFER/SALE OF ASSETS

Have you or the other party sold or transferred ownership of any asset in the last 12 months?

Yes  No

Have you or the other party withdrawn funds from an account in the last 12 months for a purpose other than paying normal household expense payments?

Yes  No

If you answered "Yes" to either of the above questions, please list asset sold or transferred OR account from which withdrawal was made, amounts received or withdrawn and any expenditure made from amounts received.

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YOU MUST COMPLETE THE REMAINING PAGES OF THIS FORM IF YOU ANSWERED "YES" TO ANY OF THE QUESTIONS ABOVE. IF YOU ANSWERED "NO" TO ALL QUESTIONS ABOVE, YOU DO NOT HAVE TO COMPLETE THE REMAINING PAGES OF THIS FORM.

**SECTION I - REAL ESTATE**

Description of Property Including Location	Market Value	Mortgages, Liens, Attachments	Equity <i>(value minus liens)</i>
Primary Residence:			
Second Home:			
Camp:			
Timeshare:			
Unimproved Land:			
Mobile Home:			
Residential Rental Real Estate Owned:			
Commercial Real Estate:			
Other Real Estate Interests:			
a.			
b.			
c.			
d.			
e.			
<b>TOTAL VALUE OF REAL ESTATE INTERESTS</b>			

IF ANY OF THE ABOVE PROPERTIES GENERATE RENTAL INCOME, YOU MUST EITHER:

1. ATTACH SCHEDULE E FROM YOUR LAST 2 TAX RETURNS

*or if you did not file taxes*

2. FILL OUT RENTAL INCOME ATTACHMENT (See 400-00813A)

**SECTION II - PERSONAL PROPERTY**

List all personal property owned by you and/or the other party. In estimating the market value, please use the amount you could reasonably receive if you sold the item today. Do not use the purchase price or replacement value.

Description of Items	Market Value	Check if Item is in Your Possession	Loans/Debts on Property	Person Paying on Loan/Debt
Jewelry				
Antiques				
Artwork				
Guns				
Coins/Stamps				
Tools				
Collectibles				
Piano/Musical instruments				
China/Crystal/Silverware				
Appliances				
Electronics				
Furnishings				
Computers				
Other:				
a.				
b.				
c.				

**SECTION III - VEHICLES and BOATS**

“Market value” for motor vehicles is the retail value indicated in the NADA Blue Book or other similar price guide.

Title Holder	Vehicle Description <i>(Year, Make, Model)</i>	Market Value	Outstanding Loan Amount	Equity <i>(Value minus Loan)</i>
	Car #1			
	Car #2			
	Truck #1			
	Truck #2			
	Motorcycle #1			
	Motorcycle #2			
	Boat #1			
	Boat #2			
	Snowmobile #1			
	Snowmobile #2			
	ATV #1			
	ATV #2			
	Camper			
	RV			
	Plane			
	Other Vehicles:			
	a.			
	b.			

**SECTION IV - BUSINESS OWNERSHIP**

Owner	Name of Business, Type of Business Activity and Legal Structure of Business <i>(e.g. Sole proprietor, Partnership, Corporation, S- Corporation)</i>	% of Interest Owned	Date of Last Valuation	Fair Market Value

You Must Attach form 400-00813A Self Employment Attachment or a Schedule C and/or Form K-1 from your last two (2) federal income tax returns for any business from which you earn or receive income, profits, distributions, in-kind income, etc.

**SECTION V - INVESTMENTS**

Owner	Type of Investment <i>(Stocks, Bonds, Annuities, Mutual Funds, Trusts, etc.)</i>	Description <i>(Name of Company, Fund, Bank, Trust and Trustee etc.)</i>	Number of Shares	Market Value

**SECTION VI - BANK ACCOUNTS and CASH**

Owner	TYPE OF ACCOUNT	Bank	Current Balance
	Checking Account #1		
	Checking Account #2		
	Savings Account #1		
	Savings Account #2		
	Money Market Account #1		
	Money Market Account #2		
	Cash in your possession		
	Tax Exempt College Funds or Other College Savings accounts		
	Health Savings Accounts		
	Other Accounts		

**SECTION VII - ACCOUNTS/FUNDS HELD FOR YOUR OR THE OTHER PARTY'S BENEFIT**

Trustee or Holder	Name of Beneficiary	Type of Account	Current Value

**SECTION VIII - LIFE INSURANCE POLICIES**

Name Of Insured	Beneficiary	Company	Face Value	Loan Balance	Cash Value

**SECTION IX - RETIREMENT ACCOUNTS**

Owner	TYPE OF ACCOUNT	Financial Institution	Value
	IRA #1		
	IRA #2		
	401(k) #1		
	401(k) #2		
	403(b)		
	TIAA/CREF		
	Keogh		
	TDSP		
	TSA		
	Profit Sharing		
	Savings & Security Program		
	Deferred Compensation		
	Other		
	Other		

**SECTION X - PENSIONS**

Owner	TYPE OF PENSION	Pension Administrator	Value
	Defined Benefit		
	Defined Contribution		
	Target Benefit		
	Military Pension		
	SEP		