**Commonwealth of Massachusetts  
The Trial Court  
Probate and Family Court Department  
FINANCIAL STATEMENT  
(Short Form)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name: | {{ plentName }} |  | Docket No. | {{ docketNum }} |

**INSTRUCTIONS:** if your income equals or exceeds $75,000.00 annually, you must complete the LONG FORM financial statement, unless otherwise ordered by the court.

|  |  |  |
| --- | --- | --- |
| {{ plentName }} | v. | {{ defendName }} |
| Plaintiff/Petitioner |  | Defendant/Petitioner |

**1. PERSONAL INFORMATION**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Your Name: | | | {{ client.name }} | | Social Security No.: | | | | {{ client.ssn }} | | | | |
| Address: | | {{ userAddress }} | | | | |  | {{ client.address.city }} | |  | {{ client.address.state }} |  | {{ client.address.zip }} |
| (Street address) | | | | | | | | (City/Town) | | | (State) | | (Zip) |
| Tel. No.: | {{ client.tele }} | | | Date of Birth: | | {{ client.birthdate }} | | | No. of children living with you: | | | {{ num\_children }} | |

{%p if employed %}

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation: | | {{ employer[0].occupation }} | | Employer: | | | | {{ employer[0].name.first }} | | | | | |
| Employer Address: | | | {{ employer[0].address.address }} | | |  | {{ employer[0].address.city }} | | |  | {{ employer[0].address.state }} |  | {{ employer[0].address.zip }} |
|  | | | (Street address) | | |  | (City/Town) | | |  | (State) |  | (Zip) |
| Tel. No.: | {{ employer[0].TelNo }} | | | Do you have health insurance coverage? | | | | | {% if ynHIns %} ☒ Yes ☐ No{% else %}☐ Yes ☒ No{% endif %} | | | | |
| if yes, name of health insurance provider: | | | | | {% if ynHIns %}{{ health\_provider }}{% endif %} | | | | | | | | |

{%p endif %}

{%p if not employed %}

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Occupation: |  | | | Employer: | | | |  | | | | | |
| Employer Address: | | |  | | |  |  | | |  |  |  |  |
|  | | | (Street address) | | |  | (City/Town) | | |  | (State) |  | (Zip) |
| Tel. No.: | |  | | Do you have health insurance coverage? | | | | | {% if ynHIns %} ☒ Yes ☐ No{% else %}☐ Yes ☒ No{% endif %} | | | | |
| if yes, name of health insurance provider: | | | | | {% if ynHIns %}{{ health\_provider }}{% endif %} | | | | | | | | |

{%p endif %}

2. **GROSS WEEKLY INCOME/RECEIPTS FROM ALL SOURCES**

|  |  |  |  |
| --- | --- | --- | --- |
| a) Base pay from {% if SW==’s’ %} ☒ Salary {% else %} ☐ Salary{% endif %}{% if SW==’w’ %} ☒ Wages {% else %}☐ Wages{% endif %} | | | ${{ ‘{:,.0f}’.format(fullTimeWkPay) }} |
| b) Overtime | | | ${{ ‘{:,.0f}’.format(totOverTime) }} |
| c) Part-time job | | | ${{ ‘{:,.0f}’.format(partTimeWkPay) }} |
| d) Self-employment **(attach a completed schedule A)** | | | ${{ ‘{:,.0f}’.format(selfEmpWkPay) }} |
| e) Tips | | | ${{ ‘{:,.0f}’.format(totTips) }} |
| f) {% if CB==’c’ %} ☒ Commissions {% else %} ☐ Commissions {% endif %} {% if CB==’b’ %} ☒ Bonuses {% else %} ☐ Bonuses{% endif %} | | | ${{ ‘{:,.0f}’.format(commBonus) }} |
| g) {% if ynDividend %} ☒ Dividends {% else %} ☐ Dividends{% endif %}{% if ynInt %} ☒ Interest {% else %} ☐ Interest{% endif %} | | | ${{ ‘{:,.0f}’.format(divInt|round(2)  ) }} |
| h) {% if ynTrust %} ☒ Trusts {% else %} ☐ Trusts{% endif %} {% if annuityAmt>0 %} ☒ Annuities {% else %} ☐ Annuities{% endif %} | | | ${{ ‘{:,.0f}’.format(trustAnn) }} |
| i) {% if pensionAmt>0 %} ☒ Pensions {% else %} ☐ Pensions{% endif %} {% if retFundAmt>0 %} ☒ Retirement funds {% else %} ☐ Retirement funds{% endif %} | | | ${{ ‘{:,.0f}’.format(penRet) }} |
| j) Social Security | | | ${{ ‘{:,.0f}’.format(wklySS) }} |
| k) {% if disAmt>0 %} ☒ Disability{% else %} ☐ Disability{% endif %} {% if unempAmt>0 %} ☒ Unemployment insurance {% else %} ☐ Unemployment insurance {% endif %} {% if workCompAmt>0 %} ☒ Worker's compensation {% else %}☐ Worker's compensation {% endif %} | | | ${{ ‘{:,.0f}’.format(disUnempWkcomp) }} |
| l) Public Assistance (e.g. welfare, TAFDC, SNAP) **(not included in gross income for child support)** | | | ${{ ‘{:,.0f}’.format(pubBens) }} |
| m){% if ChildSupportAmt>0 %} ☒ Child Support {% else %} ☐ Child Support {% endif %} {% if wklyAlimony>0 %} ☒ Alimony {% else %} ☐ Alimony {% endif %} (actually received) | | | ${{ ‘{:,.0f}’.format(chldAli) }} |
| n) Rental from income producing property **(attach a completed Schedule B)** | | | ${{ ‘{:,.0f}’.format(wklyRentIncome) }} |
| o) Royalties and other rights | | | ${{ ‘{:,.0f}’.format(wklyRoyalty) }} |
| p) Contributions from household member(s) | | | ${{ ‘{:,.0f}’.format(hContribAmt) }} |
| q) Other (specify) | | |  |
|  | {% if otherAmt1>0 %}{{ otherAmtType1 }}{% endif %} |  | ${{ ‘{:,.0f}’.format(otherAmt1) }} |
|  | {% if otherAmt2>0 %}{{ otherAmtType2 }}{% endif %} |  | ${{ ‘{:,.0f}’.format(otherAmt2) }} |
| **r) Total Gross Weekly Income/Receipts** (add items a-q) | | | **${{ ‘{:,.0f}’.format(wklyGrossIncome) }}** |

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**3. ITEMIZED DEDUCTIONS FROM GROSS INCOME**

|  |  |
| --- | --- |
| a) Federal income tax deductions (claiming {{ totFedClaimed }} exemptions) | ${{ ‘{:,.0f}’.format(wklyFedDed) }} |
| b) State income tax deductions (claiming {{ totStClaimed }} exemptions) | ${{ ‘{:,.0f}’.format(wklyStateDed) }} |
| c) F.I.C.A. and Medicare | ${{ ‘{:,.0f}’.format(wklyFicaDed) }} |
| d) Medical Insurance | ${{ ‘{:,.0f}’.format(wklyMedDed) }} |
| e) Union Dues | ${{ ‘{:,.0f}’.format(wklyUnionDed) }} |
| **f) Total Deductions (a through e)** | **${{ ‘{:,.0f}’.format(wklyTotalItemDed) }}** |
| **4. ADJUSTED NET WEEKLY INCOME [**2(r) minus 3(f)] | **${{ ‘{:,.0f}’.format(wklyAdjIncome) }}** |

**5. OTHER DEDUCTIONS FROM SALARY/WAGES**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| a) Credit Union {% if LS==’l’ %} ☒ Loan repayment {% else %} ☐ Loan repayment {% endif %} {% if LS==’s’ %} ☒ Savings {% else %} ☐ Savings{% endif %} | | | | | | ${{ ‘{:,.0f}’.format(wklyCreditDed) }} | |
| b) Savings | | | | | | ${{ ‘{:,.0f}’.format(wklySavingsDed) }} | |
| c) Retirement | | | | | | ${{ ‘{:,.0f}’.format(wklyRetDed) }} | |
| d) Other-Specify (i.e. Child Support, Deferred Compensation or 401K) | | | | | | ${{ ‘{:,.0f}’.format(wklyOtherDed) }} | |
| **e) Total Deductions** (a through d) | | | | | | **${{ ‘{:,.0f}’.format(wklyTotNItemDed) }}** | |
| **6. NET WEEKLY INCOME 4 minus 5(e)** | | | | | | **${{ ‘{:,.0f}’.format(wklyNetIncome) }}** | |
| **7. GROSS YEARLY INCOME FROM PRIOR YEAR** (attach copy of all W-2 and 1099 forms for prior year) | | | | | | **{{ '${:,.0f}'.format(preYrGrossIncome) }}** | |
| **Number of Years you have paid into Social Security** | | | | **{{ numYrSS }}** | |  | |
| **8. WEEKLY EXPENSE** | | | | | | | |
| a) Rent or Mortage (PIT) | {{ '${:,.0f}'.format(wklyRentExp) }} | l) Life Insurance | | | | | {{ '${:,.0f}'.format(wklyLifeIns) }} |
| b) Homeowners/Tenant Insurance | {{ '${:,.0f}'.format(wklyHomeIns) }} | m) Medical Insurance | | | | | {{ '${:,.0f}'.format(wklyMedIns) }} |
| c) Maintenance and Repair | {{ '${:,.0f}'.format(wklyHRepair) }} | n) Uninsured Medicals | | | | | {{ '${:,.0f}'.format(wklyUninsMed) }} |
| d) Heat | {{ '${:,.0f}'.format(wklyHeat) }} | o) Incidentals and Toiletries | | | | | {{ '${:,.0f}'.format(wklyIncidental) }} |
| e) Electricity and/or Gas | {{ '${:,.0f}'.format(wklyElecGas) }} | p) Motor Vehicle Expenses | | | | | {{ '${:,.0f}'.format(wklyCarExpense) }} |
| f) Telephone | {{ '${:,.0f}'.format(wklyTelephone) }} | q) Motor Vehicle Payment | | | | | {{ '${:,.0f}'.format(wklyCarLoan) }} |
| g) Water/Sewer | {{ '${:,.0f}'.format(wklyWater) }} | r) Child Care | | | | | {{ '${:,.0f}'.format(childCare) }} |
| h) Food | {{ '${:,.0f}'.format(Food) }} | s) Other (explain) | | | | |  |
| i) House Supplies | {{ '${:,.0f}'.format(HouseSupplies) }} |  | {% if wklyOtherExpense>0 %}{{ yrOtherExpType }}{% endif %} | |  | | {{ '${:,.0f}'.format(wklyOtherExpense) }} |
| j) Laundry and Cleaning | {{ '${:,.0f}'.format(laundry) }} |
| k) Clothing | {{ '${:,.0f}'.format(wklyClothing) }} |  | | | | |  |
| **t) Total Weekly Expenses** (a through s) | | | | | | | **{{ '${:,.0f}'.format(wklyTotalExpense) }}** |

**9. COUNSEL FEES**

|  |  |  |  |
| --- | --- | --- | --- |
| a) Retainer amount(s) paid to your attorney(s) |  | | ${{ retainerAmt }} |
| b) Legal fees incurred, to date, against retainer(s) |  | | ${{ legalFeeBilled }} |
| c) Anticipated range of total legal expense to litigate this action | ${{ estlegalFeeMin }} | to | ${{ estlegalFeeMax }} |

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**10. ASSETS** (attach additional sheet if necessary)

{%p if ynHouse %}

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| a) Real Estate | | | | | | |
| Location | {{ houses[0].location }} | | | | |  |
| Title held in the name of | | {{ houses[0].name }} | | | |  |
| Fair Market Value | {{ '${:,.0f}'.format(houses[0].hMarketVal) }} | | - Mortgage | {{ '${:,.0f}'.format(houses[0].hMort) }} | = Equity | {{ '${:,.0f}'.format(TotalHouseVal) }} |

{%p if houses.target\_number>1 %}

|  |
| --- |
| (See addendum for additional real estate information. The Equity number above is the total of all the properties.) |

{%p endif %}

{%p else %}

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| a) Real Estate | | | | | | |
| Location |  | | | | |  |
| Title held in the name of | |  | | | |  |
| Fair Market Value |  | | - Mortgage |  | = Equity |  |

{%p endif %}

{%p if ynCar %}

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| b) Motor Vehicles |  |  |  |  |  |
| Fair Market Value | {{ '${:,.0f}'.format(auto[0].carValue) }} | - Motor Vehicle Loan | {{ '${:,.0f}'.format(auto[0].carLoanAmt) }} | = Equity | {{ '${:,.0f}'.format(TotalAutoEqt) }} |

{%p if auto.target\_number>1 %}

|  |
| --- |
| (See addendum for additional motor vehicle information. The Equity number above is the total of all the vehicles.) |

{%p endif %}

{%p else %}

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| b) Motor Vehicles |  |  |  |  |  |
| Fair Market Value |  | - Motor Vehicle Loan |  | = Equity |  |
| Fair Market Value |  | - Motor Vehicle Loan |  | = Equity |  |

{%p endif %}

|  |  |  |  |
| --- | --- | --- | --- |
| c) IRA, Keogh, Pension, Profit Sharing, Other Retirement Plans:  Financial Institution or Plan Name and Account Number | | |  |
|  | {% if totRetPlanVal>0 %}{{ retPlans[0].fullName }}{% endif %} |  | {% if totRetPlanVal>0 %}{{ '${:,.0f}'.format(totRetPlanVal) }}{% endif %} |

{%p if retPlans.target\_number>1 %}

|  |
| --- |
| (See addendum for additional retirement plan information. The number above is the total of all the retirement plans.) |

{%p endif %}

|  |  |
| --- | --- |
| d) Tax Deferred Annuity Plan(s) | {% if TotaldefVal>0 %}{{ '${:,.0f}'.format(TotaldefVal) }}{% endif %} |

{%p if deferredPlan.target\_number>1 %}

|  |
| --- |
| (See addendum for additional deferred annuity information. The number above is the total of all the deferred annuities.) |

{%p endif %}

|  |  |
| --- | --- |
| e) Life Insurance: Present Cash Value | {% if totLifeInsVal>0 %}{{ '${:,.0f}'.format(totLifeInsVal) }}{% endif %} |

{%p if lifeInsurance.target\_number>1 %}

|  |
| --- |
| (See addendum for additional life insurance information. The number above is the total of all the life insurances.) |

{%p endif %}

|  |  |  |  |
| --- | --- | --- | --- |
| f) Savings & Checking Accounts, Money Market Accounts, Certificates of Deposit-which are held individually, jointly, in the name of another person for your benefit, or held by you for the benefit of your minor child(ren):  Financial Institution or Plan Name and Account Number | | |  |
|  | {% if TotalSavingsVal>0 %}{{ savingsPlan[0].name }}{% endif %} |  | {% if TotalSavingsVal>0 %}{{ '${:,.0f}'.format(TotalSavingsVal) }}{% endif %} |

{%p if savingsPlan.target\_number>1 %}

|  |
| --- |
| (See addendum for additional savings plan information. The number above is the total of all the savings plans.) |

{%p endif %}

|  |  |  |  |
| --- | --- | --- | --- |
| g) Other (e.g. stocks, bonds, collections) | | |  |
|  | {% if TotalOtherAssetsVal>0 %}{{ otherAssets[0].name }}{% endif %} |  | {% if TotalOtherAssetsVal>0 %}{{ '${:,.0f}'.format(TotalOtherAssetsVal) }}{% endif %} |

{%p if otherAssets.target\_number>1 %}

|  |
| --- |
| (See addendum for additional other assets information. The number above is the total of all the other assets.) |

{%p endif %}

|  |  |
| --- | --- |
| **h) Total Assets** (a through g) | **{{ '${:,.0f}'.format(TotalAssets) }}** |

**11. LIABILITIES (Do not list expenses shown in item 8 above.)**

{%p if debts[0].amtDue>0 %}

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Creditor | Nature of Debt | Date Incurred | Amount Due | Weekly Payment |
| a) | {{ debts[0].name }} | {{ debts[0].type }} | {{ debts[0].date }} | {{ '${:,.0f}'.format(debts[0].amtDue) }} | {{ '${:,.0f}'.format(debts[0].wklyPmt) }} |

{%p if debts.target\_number>1 %}

|  |
| --- |
| (See addendum for additional debts information.) |

{%p endif %}

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **Total Liabilities** |  | {{ '${:,.0f}'.format(TotalDebtDue) }} |  | {{ '${:,.0f}'.format(TotalDebtPmt) }} |

{%p else %}

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Creditor | | Nature of Debt | Date Incurred | | Amount Due | | Weekly Payment | |
| a) |  | |  |  | |  | |  | |
|  | |  | **Total Liabilities** | |  |  |  | |  |

{%p endif %}

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**CERTIFICATION**

I certify under the penalties of perjury that the information stated on this Financial Statement and the attached schedules, if any, is complete, true, and accurate.

|  |  |  |  |
| --- | --- | --- | --- |
| Date | {{ client.signatureDate }} | Signature | {{ client.signature }} |

|  |  |  |
| --- | --- | --- |
|  | INSTRUCTIONS: In any case where an attorney is appearing for a party, said attorney MUST complete the Statement by Attorney. |  |

**STATEMENT BY ATTORNEY**

I the undersigned attorney, am admitted to practice law in the Commonwealth of Massachusetts – am admitted pro hoc vice for the purposes of this case – and am an officer of the court. As the attorney for the party on whose behalf this Financial Statement is submitted, I hereby state to the court that I have no knowledge that any of the information contained herein is false.

{%p if attorney.signature is defined %}

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date | {{ attorney.signatureDate }} |  | {{ attorney.signature }} | | | | | |
|  |  |  | (Signature of attorney) | | | | | |
|  |  |  | {{ attorney.name }} | | | | | |
|  |  |  | (Print name) | | | | | |
|  |  |  | {{ attorney.address.address }} | | | | | |
|  |  |  | (Street address) | | | | | |
|  |  |  | {{ attorney.address.city }} | |  | {{ attorney.address.state }} |  | {{ attorney.address.zip }} |
|  |  |  | (City/Town) | |  | (State) |  | (Zip) |
|  |  |  | Tel. No. | {{ attorney.TelNo }} | | | | |
|  |  |  | B.B.O. # | {{ attorney.BBONum }} | | | | |

{%p else %}

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date |  |  |  | | | | | |
|  |  |  | (Signature of attorney) | | | | | |
|  |  |  |  | | | | | |
|  |  |  | (Print name) | | | | | |
|  |  |  |  | | | | | |
|  |  |  | (Street address) | | | | | |
|  |  |  |  | |  |  |  |  |
|  |  |  | (City/Town) | |  | (State) |  | (Zip) |
|  |  |  | Tel. No. |  | | | | |
|  |  |  | B.B.O. # |  | | | | |

{%p endif %}

{%p if selfEmpWkPay>0 %}

**FINANCIAL STATEMENT SCHEDULE A**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name: | {{ plentName }} |  | Docket No. | {{ docketNum }} |

**MONTHLY SELF-EMPLOYMENT OR BUSINESS INCOME**

|  |  |
| --- | --- |
| GROSS MONTHLY RECEIPTS | ${{ '{:,.0f}'.format(mthReceipts) }} |

Monthly Business Expenses

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Cost of goods sold | | | | | ${{ '{:,.0f}'.format(goodsCost) }} |
| Advertising | | | | | ${{ '{:,.0f}'.format(advertise) }} |
| Bad Debts | | | | | ${{ '{:,.0f}'.format(badDebts) }} |
| Motor Vehicles: | | | | |  |
| Gas | | | | | ${{ '{:,.0f}'.format(gas) }} |
| Insurance | | | | | ${{ '{:,.0f}'.format(autoIns) }} |
| Maintenance | | | | | ${{ '{:,.0f}'.format(autoMtnance) }} |
| Registration | | | | | ${{ '{:,.0f}'.format(autoReg) }} |
| Commissions | | | | | ${{ '{:,.0f}'.format(commissionPaid) }} |
| Depletion | | | | | ${{ '{:,.0f}'.format(depletion) }} |
| Dues and Publications | | | | | ${{ '{:,.0f}'.format(duesPub) }} |
| Employee Benefit Programs | | | | | ${{ '{:,.0f}'.format(eeBens) }} |
| Freight | | | | | ${{ '{:,.0f}'.format(freight) }} |
| Insurance (other than health), please specify type of insurance: | | | | |  |
|  | | {% if OtherIns1>0 %}{{ OtherInsType1 }}{% endif %} |  | | ${{ '{:,.0f}'.format(OtherIns1) }} |
|  | | {% if OtherIns2>0 %} { OtherInsType2 }}{% endif %} |  | | ${{ '{:,.0f}'.format(OtherIns2) }} |
| Interest on mortgage to banks | | | | | ${{ '{:,.0f}'.format(mortgageInt) }} |
| Interest on loans | | | | | ${{ '{:,.0f}'.format(loanInt) }} |
| Legal and Professional services | | | | | ${{ '{:,.0f}'.format(legalFees) }} |
| Office expenses | | | | | ${{ '{:,.0f}'.format(officeExpenses) }} |
| Laundry and cleaning | | | | | ${{ '{:,.0f}'.format(laundry) }} |
| Pension and profit sharing | | | | | ${{ '{:,.0f}'.format(pensionPaid) }} |
| Rent on leased equipment | | | | | ${{ '{:,.0f}'.format(equipmtRent) }} |
| Machinery/Equipment | | | | | ${{ '{:,.0f}'.format(equipmtBought) }} |
| Other business property | | | | | ${{ '{:,.0f}'.format(otherProperty) }} |
| Repairs | | | | | ${{ '{:,.0f}'.format(propertyRepairs) }} |
| Supplies | | | | | ${{ '{:,.0f}'.format(supplies) }} |
| Taxes | | | | | ${{ '{:,.0f}'.format(taxes) }} |
| Travel | | | | | ${{ '{:,.0f}'.format(travel) }} |
| Meals and entertainment | | | | | ${{ '{:,.0f}'.format(meals) }} |
| Utilities and phones | | | | | ${{ '{:,.0f}'.format(utilities) }} |
| Wages | | | | | ${{ '{:,.0f}'.format(wagesPaid) }} |
| Other expenses (specify) | | | | |  |
|  | {% if otherExp1>0 %}{{ otherExpType1 }}{% endif %} | | |  | ${{ '{:,.0f}'.format(otherExp1) }} |
|  | {% if otherExp2>0 %}{{ otherExpType2 }}{% endif %} | | |  | ${{ '{:,.0f}'.format(otherExp2) }} |
| **TOTAL MONTHLY EXPENSES** | | | | | **${{ '{:,.0f}'.format(totMthExp) }}** |
| **WEEKLY BUSINESS INCOME** (Gross monthly receipts less total monthly expenses divided by 4.3.) Enter this amount in Section II, line (d) of CJ-D 301-L or Section 2(d) of CJ-D 301-S. | | | | | **${{ '{:,.0f}'.format(wklyIncome) }}** |

**FINANCIAL STATEMENT SCHEDULE A**

NATURE OF SELF-EMPLOYMENT OR BUSINESS

1. Is this business seasonal in nature?

|  |
| --- |
| {% if ynSeasonal %} ☒ Yes ☐ No{% elif not ynSeasonal %}☐ Yes ☒ No{% else %}☐ Yes ☐ No{% endif %} |

2. If a seasonal business, please specify percentage of income received and expenses incurred for each month of the year.

{%p if ynSeasonal %}

|  |  |  |
| --- | --- | --- |
| MONTH | PERCENTAGE OF INCOME RECEIVED | EXPENSES INCURRED |
| January | {{ incomeJan }}% | {{ expJan }}% |
| February | {{ incomeFeb }}% | {{ expFeb }}% |
| March | {{ incomeMar }}% | {{ expMar }}% |
| April | {{ incomeApr }}% | {{ expApr }}% |
| May | {{ incomeMay }}% | {{ expMay }}% |
| June | {{ incomeJun }}% | {{ expJun }}% |
| July | {{ incomeJul }}% | {{ expJul }}% |
| August | {{ incomeAug }}% | {{ expAug }}% |
| September | {{ incomeSep }}% | {{ expSep }}% |
| October | {{ incomeOct }}% | {{ expOct }}% |
| November | {{ incomeNov }}% | {{ expNov }}% |
| December | {{ incomeDec }}% | {{ expDec }}% |

{%p endif %}

{%p if not ynSeasonal %}

|  |  |  |
| --- | --- | --- |
| MONTH | PERCENTAGE OF INCOME RECEIVED | EXPENSES INCURRED |
| January |  |  |
| February |  |  |
| March |  |  |
| April |  |  |
| May |  |  |
| June |  |  |
| July |  |  |
| August |  |  |
| September |  |  |
| October |  |  |
| November |  |  |
| December |  |  |

{%p endif %}

3. State whether your business accounts on a calendar year basis or fiscal year basis:

|  |
| --- |
| {% if acctYr == ‘calendarYr’ %} ☒ Calendar ☐ Fiscal{% else%}☐ Calendar ☒ Fiscal{% endif %} |

4. If your business accounts on a fiscal year basis, give the starting and ending dates of your chosen fiscal year:

|  |  |  |
| --- | --- | --- |
| {% if acctYr ==’fiscalYr’ %}{{ fiscalYrStart }}{% endif %} | | {% if acctYr ==’fiscalYr’ %}{{ fiscalYrEnd }}{% endif %} |
| starting |  | ending |
| 5. State your gross receipts, year to date: | | ${{ '{:,.0f}'.format(yrToDateReceipts) }} |
| 6. State your gross expenses, year to date: | | ${{ '{:,.0f}'.format(yrToDateExpenses) }} |

{%p endif %}

{%p if ynRentIncome %}

**FINANCIAL STATEMENT SCHEDULE B**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name: | {{ plentName }} |  | Docket No. | {{ docketNum }} |

RENT FROM INCOME PRODUCING PROPERTY

|  |  |
| --- | --- |
| ANNUAL RENT RECEIVED | ${{ '{:,.0f}'.format(annRentRecived) }} |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ANNUAL RENTAL EXPENSES | | | | | | |
|  | Advertising | | | | | ${{ '{:,.0f}'.format(rentAdvertise) }} |
|  | Motor Vehicle and Travel | | | | | ${{ '{:,.0f}'.format(totRentAutoExp) }} |
|  | Insurance | | | | | ${{ '{:,.0f}'.format(rentInsurance) }} |
|  | Cleaning and maintenance | | | | | ${{ '{:,.0f}'.format(rentMaint) }} |
|  | Commissions | | | | | ${{ '{:,.0f}'.format(rentCommission) }} |
|  | Interest on mortgage to banks | | | | | ${{ '{:,.0f}'.format(rentMortgageInt) }} |
|  | Other interest (specify) | | | | |  |
|  |  | {% if rentLoanInt1>0 %}{{ rentLoanIntType1 }}{% endif %} |  | | | ${{ '{:,.0f}'.format(rentLoanInt1) }} |
|  |  | {% if rentLoanInt2>0 %}{{ rentLoanIntType2 }}{% endif %} |  | | | ${{ '{:,.0f}'.format(rentLoanInt2) }} |
|  | Legal and professional services | | | | | ${{ '{:,.0f}'.format(rentLegalFees) }} |
|  | Repairs | | | | | ${{ '{:,.0f}'.format(rentRepairs) }} |
|  | Supplies | | | | | ${{ '{:,.0f}'.format(rentSupplies) }} |
|  | Taxes | | | | | ${{ '{:,.0f}'.format(rentTaxes) }} |
|  | Utilities | | | | | ${{ '{:,.0f}'.format(rentUtilities) }} |
|  | Wages | | | | | ${{ '{:,.0f}'.format(rentWages) }} |
|  | Other expenses (specify) | | | | |  |
|  | {% if rentOtherExp1>0 %} {{ rentOtherExpType1 }}{% endif %} | | |  | | ${{ '{:,.0f}'.format(rentOtherExp1) }} |
|  | {% if rentOtherExp2>0 %} {{ rentOtherExpType2 }}{% endif %} | | |  | | ${{ '{:,.0f}'.format(rentOtherExp2) }} |
| TOTAL ANNUAL EXPENSES | | | | | ${{ '{:,.0f}'.format(totalRentExp) }} | |
| TOTAL WEEKLY RENTAL INCOME  (Gross rent received less expenses, divided by 52).  Enter this amount in Section II, line (n) of CJ-D 301-L  or Section 2(n) of CJ-D 301-S | | | | | ${{ '{:,.0f}'.format(wklyRentIncome) }} | |

{%p endif %}

{%p if employer.target\_number > 1 or addAssets or debts.target\_number > 1 %}

### **ADDENDUM**

{%p endif %}

{%p if employer.target\_number > 1 %}

**Additional Employer Info**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| {%tr for y in employer[1:] %} | | | | | | | | | | | | | |
| Occupation: | | {{ y.occupation }} | | | | | Employer: | {{ y.name.first }} | | | | | |
| Employer Address: | | | {{ y.address.address }} | |  | {{ y.address.city }} | | | |  | {{ y.address.state }} |  | {{ y.address.zip }} |
|  | | | (Street address) | |  | (City/Town) | | | |  | (State) |  | (Zip) |
| Tel. No.: | {{ employer[0].TelNo }} | | |  | | | | |  | | | | |
| {%tr endfor %} | | | | | | | | | | | | | |

{%p endif %}

{%p if addAssets %}

**Additional Assets Info**

{%p endif %}

{%p if houses.target\_number >1 %}

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| a) Real Estate | | | | | | | |
| {%tr for y in houses[1:] %} | | | | | | | |
|  | Location | {{ y.location }} | | | | |  |
| Title held in the name of | | | {{ y.name }} | | | |  |
| Fair Market Value | | ${{ '{:,.0f}'.format(y.hMarketVal) }} | | - Mortgage | ${{ '{:,.0f}'.format(y.hMort) }} | = Equity | ${{ '{:,.0f}'.format(y.hEquity) }} |
| {%tr endfor %} | | | | | | | |

{%p endif %}

{%p if auto.target\_number >1 %}

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| b) Motor Vehicles |  |  |  |  |  |

{%p endif %}

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| {%tr for y in auto[1:] %} | | | | | | |
|  | Fair Market Value | ${{ '{:,.0f}'.format(y.carValue) }} | - Motor Vehicle Loan | ${{ '{:,.0f}'.format(y.carLoanAmt) }} | = Equity | ${{ '{:,.0f}'.format(y.equity) }} |
| {%tr endfor %} | | | | | | |

{%p if retPlans.target\_number > 1 %}

|  |  |
| --- | --- |
| c) IRA, Keogh, Pension, Profit Sharing, Other Retirement Plans:  Financial Institution or Plan Name and Account Number |  |

{%p endif %}

|  |  |  |  |
| --- | --- | --- | --- |
| {%tr for y in retPlans[1:] %} | | | |
|  | {{ y.fullName }} |  | ${{ '{:,.0f}'.format(y.amt) }} |
| {%tr endfor %} | | | |

{%p if deferredPlan.target\_number > 1 %}

|  |  |  |
| --- | --- | --- |
| {%tr for y in deferredPlan %} | | |
|  | Tax Deferred Annuity Plan(s) ${{ '{:,.0f}'.format(y.amt) }} | ${{ '{:,.0f}'.format(y.amt) }} |
| {%tr endfor %} | | |

{%p endif %}

{%p if lifeInsurance.target\_number > 1 %}

|  |  |  |
| --- | --- | --- |
| {%tr for y in lifeInsurance %} | | |
|  | Life Insurance: Present Cash Value | ${{ '{:,.0f}'.format(y.amt) }} |
| {%tr endfor %} | | |

{%p endif %}

{%p if savingsPlan.target\_number > 1 %}

|  |  |
| --- | --- |
| f) Savings & Checking Accounts, Money Market Accounts, Certificates of Deposit-which are held individually, jointly, in the name of another person for your benefit, or held by you for the benefit of your minor child(ren):  Financial Institution or Plan Name and Account Number |  |

{%p endif %}

|  |  |  |  |
| --- | --- | --- | --- |
| {%tr for y in savingsPlan[1:] %} | | | |
|  | {{ y.name }} |  | ${{ '{:,.0f}'.format(y.amt) }} |
| {%tr endfor %} | | | |

{%p if otherAssets.target\_number > 1 %}

|  |  |
| --- | --- |
| g) Other (e.g. stocks, bonds, collections) |  |

{%p endif %}

|  |  |  |  |
| --- | --- | --- | --- |
| {%tr for y in otherAssets[1:] %} | | | |
|  | {{ y.name }} |  | ${{ '{:,.0f}'.format(y.amt) }} |
| {%tr endfor %} | | | |

{%p if debts.target\_number > 1 %}

**Additional Liabilities Info**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Creditor | Nature of Debt | Date Incurred | Amount Due | Weekly Payment |

{%p endif %}

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| {%tr for y in debts[1:] %} | | | | | |
|  | {{ y }} | {{ y.type }} | {{ y.date }} | ${{ '{:,.0f}'.format(y.amtDue) }} | ${{ '{:,.0f}'.format(y.wklyPmt) }} |
| {%tr endfor %} | | | | | |