

[Previous](#)

NEXT

Tell us about your current job, if you're unemployed, your most recent job:

Employer name

☐ Self-Employed Owner /Sole-proprietor

☐ Self-Employed Business Partner

Street address

Address

City

State

Zip Code

Date started (mm/dd/yyyy)

If unemployed, date ended (mm/dd/yyyy)

What is your tax status? ☐ Single ☐ Married, filing single ☐ Married, filing jointly

+ Add New Income

+ Add New Expense

Click to add a new expense



Click to see every addition or change

History

Export

Complete

Income

Me

My Spouse

[Invite your spouse](#)

Click to add a new income

As you add income, icons will appear here to represent each entry. Click on icons to edit or delete.

Click to export to PDF or Exel format

Send an email invitation to your spouse to join your account and add their information. You can also add information on behalf of your spouse, which they will be able to review and approve

\$000,000

Total amount of income for you

Total amount of income for your spouse

\$000,000

Expenses

As you add expenses, icons will appear here to represent each entry. Click on icons to edit or delete.

Total amount of expenses for you

Total amount of expenses for your spouse

\$000,000

\$000,000

+ Add New Income

+ Add New Expense



History

Export

Complete

Income

Me

My Spouse

[Invite your spouse](#)

\$000,000

\$000,000

Expenses

\$000,000

\$000,000

+ Add New Income

+ Add New Expense



History

Export

Complete

Income

Me



\$5,000 W2 Monthly Income



\$5,000 1099 Monthly Income

\$10,000.00

My Spouse

spouse@gmail.com
has joined



\$3,000 W2 Monthly Income

\$3,000.00

Expenses



\$500 Monthly Car Payment



\$100 Monthly Cell Phone Payment



\$3,000 Monthly Mortgage Payment



\$200 Monthly Student Loan Payment

\$3,800.00



\$300 Monthly Car Payment



\$50 Monthly Cell Phone Payment



\$1,000 Monthly Mortgage Payment



\$100 Monthly Credit Card Payment

\$1,450.00



+ Add New Income + Add New Expense



History Export Complete

Who does the income belong to? ☐ Me ☐ Spouse

What type of income?

Give us a short description of the income. Include specifics, including employer name or tax ID. For example, Apple Inc. W2 salary, or 1099 tax ID ending #1345. Your documents will be considered incomplete without this information.

Description goes here ...

How much is this income?

\$000,000.00

How often is this income paid? ☐ Monthly ☐ Bi-weekly ☐ Weekly ☐ Hourly

Do you have any additional details to add about this asset? For example, plans to close or transfer financial accounts, changing the title on cars, arrangements for dividing up personal items like furniture.

My Spouse

spouse@gmail.com

Monthly Income

	\$3,000.00
--	------------

Monthly Car Payment

Monthly Cell Phone Payment

Monthly Mortgage Payment

Monthly Credit Card Payment

	\$1,450.00
--	------------



Who does the income belong to? ☒ Me ☐ Spouse

What type of income?



Salary or wages
(gross, before taxes)



Overtime
(gross, before taxes)



Commissions or bonus



Public assistance
(for example: TANF,SSI,GA/GR)



Spousal support
(from different marriage)



Pension/retirement fund payments



Social security retirement
(not SSI)



Disability



Unemployment compensation

ifications, including employer name or
ID ending #1345. Your documents
1.

\$000,000.00

by ☐ Bi-weekly ☐ Weekly ☐ Hourly

set? For example, plans to close or
arrangements for dividing up per-

My Spouse

spouse@gmail.com

Monthly Income

\$3,000.00

Monthly Car Payment

Monthly Cell Phone Payment

Monthly Mortgage Payment

Monthly Credit Card Payment

\$1,450.00



+ Add New Income + Add New Expense



History Export Complete

Who does the expense belong to? ☐ Me ☐ Spouse

What type of expense?

Give us a short description of the expense. Include specifics, including partial account ID or identification number. For example, AT&T account ending in 0012, Audi car payment, etc. Your documents will be considered incomplete without this information.

Description goes here ...

What date did you acquire this expense?

MM/DD/YYYY

What is the estimated payment?

\$000,000.00

How much of this expense are you paying?

\$000,000.00

My Spouse

spouse@gmail.com

Monthly Income

\$3,000.00

Monthly Car Payment

Monthly Cell Phone Payment

Monthly Mortgage Payment

Monthly Credit Card Payment

\$1,450.00



Who does the expense belong to? ☐ Me ☐ Spouse

What type of expense?



Auto



Charitable contributions



Home



Health-care



Child care



Education



Groceries/household



Installment



Insurance

Specifics, including partial account id
ending in 0012, Audi car payment,
without this information.

MM/DD/YYYY

\$000,000.00

\$000,000.00

My Spouse

spouse@gmail.com

Monthly Income

\$3,000.00

Monthly Car Payment

Monthly Cell Phone Payment

Monthly Mortgage Payment

Monthly Credit Card Payment

\$1,450.00

Who does the expense belong to? ☐ Me ☐ Spouse

What type of expense? ▾

Give us a short description of the expense. Include specifics, including partial account id or identification number. For example, AT&T account ending in 0012, Audi car payment, etc. Your documents will be considered incomplete without this information.

Description goes here ...

Did you acquire this expense in your marriage or separately? ☐ Separately ☐ In marriage

What date did you acquire this expense?

MM/DD/YYYY

What is the estimated payment?

\$000,000.00

How much of this expense are you paying?

\$000,000.00

How much of this expense is your spouse paying?

How often do you pay these expenses?

Do you have any additional details to add about this debt? For example, plans to close or transfer financial accounts, changing the titles, arrangements for dividing up loans...

Description goes here ...

Add Expense



Auto



Charitable contributions



Home



Health-care



Child care



Education



Groceries/household



Installment



Insurance



Recreational



Telephone



Utilities

Who does the income belong to? ☐ Me ☐ Spouse

What type of income?

Give us a short description of the income. Include specifics, including employer name or tax ID. For example, Apple Inc. W2 salary, or 1099 tax ID ending #1345. Your documents will be considered incomplete without this information.

Description goes here ...

How much is this income?

\$000,000.00

How often is this income paid? ☐ Monthly ☐ Bi-weekly ☐ Weekly ☐ Hourly

Do you have any additional details to add about this asset? For example, plans to close or transfer financial accounts, changing the title on cars, arrangements for dividing up personal items like furniture.

Additional details go here ...

Add Income



Salary or wages
(gross, before taxes)



Overtime
(gross, before taxes)



Commissions or bonus



Public assistance
(for example: TANF,SSI,GA/GR)



Spousal support
(from different marriage)



Pension/retirement fund payments



Social security retirement
(not SSI)



Disability



Unemployment compensation



Workers' compensation



Other
(military BAQ, royalty payments, etc.)



Self-employment


Review

Me

Income

 Monthly Income	\$900,000	Edit
 Monthly Income	\$10,000	Edit
Total: \$10,000.00		

Expenses



 Monthly Car Payment	-\$500	Edit
 Monthly Cell Phone Payment	-\$100	Edit
 Monthly MortgagePayment	-\$3,000	Edit
 Monthly Student Loan Payment	-\$200	Edit
Total: -\$3,800.00		

Spouse

Income

 Monthly Income	\$3,000	Edit
Total: \$3,000.00		

Expenses

 Monthly Car Payment	-\$300	Edit
 Monthly Cell Phone Payment	-\$50	Edit
 Monthly Mortgage Payment	-\$1,000	Edit
 Monthly Credit Card Payment	-\$100	Edit
Total: -\$1,450.00		