

## Financial statement

- For a financial order under the Matrimonial Causes Act 1973/ Civil Partnership Act 2004
- For financial relief after an overseas divorce etc under Part 3 of the Matrimonial and Family Proceedings Act 1984/Schedule 7 to the Civil Partnership Act 2004

To be completed by the relevant party	
Name of court	Case No.
Name of Applicant	
Name of Respondent	

of

(please tick appropriate boxes)

☐ Spouse ☐ Civil partner

Dated    /    /

### The parties are

and

Who is the

- ☐ Spouse ☐ civil partner  
☐ Petitioner ☐ Applicant ☐ Respondent in the  
☐ divorce ☐ dissolution ☐ nullity  
☐ (judicial) separation ☐ financial relief application

Applicant in this matter

Who is the

- ☐ Spouse ☐ civil partner  
☐ Petitioner ☐ Applicant ☐ Respondent in the  
☐ divorce ☐ dissolution ☐ nullity  
☐ (judicial) separation ☐ financial relief application

Respondent in this matter

This form should only be completed in applications for a financial order (which can only be applied for as part of a divorce, dissolution, annulment or (judicial) separation in the High Court or family courts in England and Wales) or for applications for financial relief after an overseas divorce/dissolution etc. If the application is for any other financial remedy please complete Form E1.

This form should be used if the application is for the variation of an order for periodical payments where the applicant seeks the dismissal (immediate or otherwise) of the periodical payments order and its substitution with one or more of a lump sum order, a property adjustment order, a pension sharing order or a pension compensation sharing order. If you are making such an application, you must complete sections 1.14 and 5.1(e) of this form.

If the application is for any other variation of an order for a financial remedy please complete Form E2.

Please fill in this form fully and accurately. Where any box is not applicable, write 'N/A'.

You have a duty to the court to give a full, frank and clear disclosure of all your financial and other relevant circumstances.

A failure to give full and accurate disclosure may result in any order the court makes being set aside.

If you are found to have been deliberately untruthful, criminal proceedings may be brought against you for fraud under the Fraud Act 2006.

The information given in this form must be confirmed by a statement of truth. **Proceedings for contempt of court may be brought against a person who makes or causes to be made, a false statement in a document verified by a statement of truth.**

You must attach documents to the form where they are specifically sought and you may attach other documents where it is necessary to explain or clarify any of the information that you give.

Essential documents that must accompany this statement are detailed in the form.

If there is not enough room on the form for any particular piece of information, you may continue on an attached sheet of paper.

If you are in doubt about how to complete any part of this form you should seek legal advice.

2.12 List any directorships you hold or have held in the last 12 months (other than those already disclosed in Section 2.11).

## 2 Financial Details

### Part 4 Capital: Pensions and Pension Protection Fund (PPF) Compensation

2.13 Give details of all your pension rights and all PPF compensation entitlements, including prospective entitlements. Complete a separate page for each pension or PPF compensation entitlement.

EXCLUDE:

- Basic State Pension

INCLUDE (complete a separate page for each one):

- Additional State Pension (SERPS and State Second Pension (S2P))
- Free Standing Additional Voluntary Contribution Schemes (FSAVC) separate from the scheme of your employer
- Membership of ALL pension plans or schemes
- PPF compensation entitlement for each scheme you were a member of which has transferred to PPF

Documentation required for attachment to this section:

- A recent statement showing the cash equivalent (CE) provided by the trustees or managers of each pension arrangement; for the additional state pension, a valuation of these rights or for PPF a valuation of PPF compensation entitlement
- If any valuation is not available, give the estimated date when it will be available and attach a copy of your letter to the pension company, administrators, or PPF Board from whom the information was sought and/or state the date on which an application for a valuation of an Additional State Pension was submitted to the Department of Work and Pensions

Name and address of pension arrangement or PPF Board

Your National Insurance Number

Number of pension arrangement or reference number or PPF compensation reference number

Type of scheme  
e.g. occupational or personal, final salary, money purchase, additional state pension, PPF or other (if other, please give details)

Date the CE, PPF compensation or additional state pension was calculated

Is the pension in payment or drawdown?  
(please answer Yes or No)

State the CE quotation, the additional state pension valuation or PPF valuation of those rights

If the arrangement is an occupational pension arrangement that is paying reduced CEs, please quote what the CE would have been if not reduced. If this is not possible, please indicate if the CE quoted is a reduced CE

Is the PPF compensation capped?  
(please answer Yes or No)

Date	Month	Year
<input type="checkbox"/> Yes <input type="checkbox"/> No		
<input type="checkbox"/> Yes <input type="checkbox"/> No		

TOTAL value of ALL your pension assets: TOTAL F

£

## 2 Financial Details      Summaries

### 2.20 Summary of your capital (Parts 1 to 5).

Description	Reference of the section on this statement	Value
Current value of your interest in the family home	A	
Current value of your interest in all other property	B	
Current value of your interest in personal assets	C	
Current value of your interest in business assets	E	
Current value of your pension and PPF compensation assets	F	
Current value of all your other assets	G	
Total value of your assets (Totals A+B+C+E+F+G)		£
Current value of your liabilities	D	
Value of your assets <b>LESS</b> the value of your liabilities (Totals A+B+C+E+F+G – D)		£

### 2.21 Summary of your estimated income for the next 12 months (Parts 6 to 10).

Description	Reference of the section on this statement	Value
Estimated net total of income from employment	H	
Estimated net total of income from self-employment or partnership	I	
Estimated net total of investment income	J	
Estimated state benefit receipts	K	
Estimated net total of all other income	L	
Estimated TOTAL income for the next 12 months (Totals H to L):		£

## 4 Other Information

### 4.1 Details of any significant changes in your assets or income.

At both sections 4.1.1 and 4.1.2, INCLUDE:

- ALL assets held both within and outside England and Wales
- The disposal of any asset

#### 4.1.1 Significant changes in assets or income during the LAST 12 months.

#### 4.1.2 Significant changes in assets or income likely to occur during the NEXT 12 months.

### 4.2 Brief details of the standard of living enjoyed by you and your spouse/civil partner during the marriage/civil partnership.

4.3 Are there any particular contributions to the family property and assets or outgoings, or to family life, or the welfare of the family that have been made by you, your partner or anyone else that you think should be taken into account? If there are any such items, briefly describe the contribution and state the amount, when it was made and by whom.

INCLUDE:

- Contributions already made
- Contributions that will be made in the foreseeable future

4.4 Bad behaviour or conduct by the other party will only be taken into account in very exceptional circumstances when deciding how assets should be shared after divorce/dissolution. If you feel it should be taken into account in your case, identify the nature of the behaviour or conduct below.

4.5 Give details of any other circumstances that you consider could significantly affect the extent of the financial provision to be made by or for you or any child of the family.

INCLUDE (the following list is not exhaustive):

- Earning capacity
- Disability
- Inheritance prospects
- Redundancy
- Retirement
- Any agreement made between you and your spouse/civil partner before or after your marriage/civil partnership stating whether or not you rely upon the agreement giving your reasons
- Any plans to marry, form a civil partnership or live with a new partner
- Any contingent liabilities