

Commonwealth of Massachusetts

The Trial Court

Probate and Family Court Department

FINANCIAL STATEMENT

(Short Form)

Division _____

Docket No. _____

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.

Plaintiff/Petitioner

v.

Defendant/Petitioner

1. PERSONAL INFORMATION

Your Name _____ Social Security No. _____

Address _____
(Street address) (City/Town) (State) (Zip)

Tel. No. _____ Date of Birth _____ No. of children living with you _____

Occupation _____ Employer _____

Employer's Address _____
(Street address) (City/Town) (State) (Zip)

Tel. No. _____ Do you have health insurance coverage? ☐ Yes ☐ No

if yes, name of health insurance provider _____

2. GROSS WEEKLY INCOME/RECEIPTS FROM ALL SOURCES

a) Base pay from ☐ Salary ☐ Wages \$ _____

b) Overtime \$ _____

c) Part-time job \$ _____

d) Self-employment (**attach a completed schedule A**) \$ _____

e) Tips \$ _____

f) ☐ Commissions ☐ Bonuses \$ _____

g) ☐ Dividends ☐ Interest \$ _____

h) ☐ Trusts ☐ Annuities \$ _____

i) ☐ Pensions ☐ Retirement funds \$ _____

j) Social Security \$ _____

k) ☐ Disability ☐ Unemployment insurance ☐ Worker's compensation \$ _____

l) Public Assistance (e.g. welfare, TAFDC, SNAP) (**not included in gross income for child support**) \$ _____

m) ☐ Child Support ☐ Alimony (actually received) \$ _____

n) Rental from income producing property (**attach a completed Schedule B**) \$ _____

o) Royalties and other rights \$ _____

p) Contributions from household member(s) \$ _____

q) Other (specify) _____

_____ \$ _____

_____ \$ _____

r) Total Gross Weekly Income/Receipts (add items a-q) \$ _____

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3. ITEMIZED DEDUCTIONS FROM GROSS INCOME

a) Federal income tax deductions (claiming _____ exemptions)	\$ _____
b) State income tax deductions (claiming _____ exemptions)	\$ _____
c) F.I.C.A. and Medicare	\$ _____
d) Medical Insurance	\$ _____
e) Union Dues	\$ _____
f) Total Deductions (a through e)	\$ _____

4. ADJUSTED NET WEEKLY INCOME

$$2(r) \text{ minus } 3(f)$$

\$

5. OTHER DEDUCTIONS FROM SALARY/WAGES

a) Credit Union	<input type="checkbox"/> Loan repayment	<input type="checkbox"/> Savings	\$ _____
b) Savings			\$ _____
c) Retirement			\$ _____
d) Other-Specify (i.e. Child Support, Deferred Compensation or 401K)	_____		\$ _____
e) Total Deductions (a through d)			\$ _____

6. NET WEEKLY INCOME

4 minus 5(e)

\$

7. GROSS YEARLY INCOME FROM PRIOR YEAR

(attach copy of all W-2 and 1099 forms for prior year)

\$

Number of Years you have paid into Social Security

8. WEEKLY EXPENSES

a) Rent or Mortgage (PIT)	\$ _____	l) Life Insurance	\$ _____
b) Homeowners/Tenant Insurance	\$ _____	m) Medical Insurance	\$ _____
c) Maintenance and Repair	\$ _____	n) Uninsured Medicals	\$ _____
d) Heat	\$ _____	o) Incidentals and Toiletries	\$ _____
e) Electricity and/or Gas	\$ _____	p) Motor Vehicle Expenses	\$ _____
f) Telephone	\$ _____	q) Motor Vehicle Payment	\$ _____
g) Water/Sewer	\$ _____	r) Child Care	\$ _____
h) Food	\$ _____	s) Other (explain)	
i) House Supplies	\$ _____	_____	\$ _____
j) Laundry and Cleaning	\$ _____	_____	\$ _____
k) Clothing	\$ _____		
t) Total Weekly Expenses (a through s)			\$ _____

9. COUNSEL FEES

a) Retainer amount(s) paid to your attorney(s) \$ _____

b) Legal fees incurred, to date, against retainer(s) \$ _____

c) Anticipated range of total legal expense to litigate this action \$ _____ to \$ _____

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10. ASSETS (attach additional sheet if necessary)

a) Real Estate

Location _____

Title held in the name of _____

Fair Market Value \$ _____ - Mortgage \$ _____ = Equity \$ _____

b) Motor Vehicles

Fair Market Value \$ _____ - Motor Vehicle Loan \$ _____ = Equity \$ _____

Fair Market Value \$ _____ - Motor Vehicle Loan \$ _____ = Equity \$ _____

c) IRA, Keogh, Pension, Profit Sharing, Other Retirement Plans:

Financial Institution or Plan Name and Account Number

_____ \$ _____

_____ \$ _____

_____ \$ _____

d) Tax Deferred Annuity Plan(s)

_____ \$ _____

e) Life Insurance: Present Cash Value

_____ \$ _____

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

_____ \$ _____

_____ \$ _____

_____ \$ _____

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

_____ \$ _____

_____ \$ _____

h) Total Assets (a through g)

_____ \$ _____

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

	Creditor	Nature of Debt	Date Incurred	Amount Due	Weekly Payment
a)				\$	\$
b)				\$	\$
c)				\$	\$
d)				\$	\$

e) Total Liabilities

\$ _____

\$ _____

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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 _____ 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.

Date _____

(Signature of attorney)

(Print name)

(Street address)

(City/Town)

(State)

(Zip)

Tel. No. _____

B.B.O. # _____