**STATEMENT OF FINANCIAL CONDITION**

**IMPORTANT: YOU MUST WRITE AN ANSWER FOR EVERY QUESTION. WRITE N/A IF THE QUESITON DOES NOT APPLY TO YOU. ATTACH ADDITIONAL SHEETS WHENEVER NECESSARY**

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| SECTION I – PERSONAL INFORMATION | | |
| 1. NAME AND ADDRESS  {{ client.name.first }} {{client.name.middle }} {{ client.name.last }}  {{ client.address.address }}  {{client.address.city }} {{client.address.state }} {{ client.address.zip }}    HOW LONG AT CURRENT ADDRESS?  {{client.address.years }} YEARS {{client.address.month }} MONTHS | 2. HOME PHONE NUMBER  {{ client.homephone }} | 3. CELL PHONE NUMBER  {{ client.cellphone }} |
| 4. SOCIAL SECURITY NUMBER  {{ client.ssn }} | 5. E-MAIL ADDRESS  {{ client.email }} |
| 6. TYPE OF RESIDENCE: {{ client.address.type }}  {% if client.address.type == ‘Other’ %}  SPECIFY: {{ client.address.type\_specify }}  {% endif %} | 7. DRIVER’S LICENSE NUMBER  {{ client.dl }} | 8. DATE OF BIRTH  {{ client.birthdate }} |
| 9. MARITAL STATUS:  {{ client.marital\_status }} | 10: CURRENT SPOUSE’S NAME  {{ client.spouse\_name }} | 11 SPOUSE’S DATE OF BIRTH  {{ client.spouse\_birthdate }} |

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| SECTION II – PERSONAL INFORMATION | | | | | | |
| 12. provide the following information for each of the CHILDREN IN FOR WHOM YOU PAY SUPPORT IN THIS CASE (ATTACH ADDITIONAL SHEET IF NEEDED) | | | | | | |
| NAME | | DATE OF BIRTH | | DOES YOUR CHILD LIVE WITH YOU? | | IF YOU PAY CHILD SUPPORT, INDICATE AMOUNT AND FREQUENCY (WEEKLY OR MONTHLY) |
| {% if haschildren == True %}{% for c in children %}{{ children.item(c).name }} | | {{ children.item(c).birthdate }} | | {{ children.item(c).live\_with }} | | {% if children.item(c).pay\_support == True %} Amount: {{ currency(div\_amt) }}  Frequency: {{ children.item(c).support\_freq }}{% else %}N/A{% endif %} |
| {% endfor %}{% endif %}  13. PROVIDE THE FOLLOWING INFORMATION for each individual who resides in your household (attach additional sheet if needed) | | | | | | |
| name | relationship to you | | does individual contribute to household expenses? | | amount of monthly contribution | |
| {% if hasindividual %}{% for ind in ind\_household %}{{ ind\_household.item(ind).name }} | {{ ind\_household.item(ind).name }} | | {{ ind\_household.item(ind). month\_contrib }} | | {% if ind\_household.item(ind).month\_contrib == True %}{{ currency(ind\_household.item(ind). month\_contrib\_amt )}}{% else %}N/A{% endif %} | |
| {% endfor %}{% endif %} |  | |  | |  | |

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| SECTION III – EMPLOYMENT INFORMATION | | |
| 14. EMPLOYER NAME AND ADDRESS  {% if client\_is\_employed == True %}  {{ employer.name }}  {{ employer.address.address }}  {{employer.address.city }} {{employer.address.state }} {{ employer.address.zip }}  {% else %}N/A{% endif %} | 15. EMPLOYER PHONE NUMBER  {% if client\_is\_employed == True %}{{ employer.phone }}{% else %}N/A{% endif %} | 16. OCCUPATION  {% if client\_is\_employed == True %}  {{ employer.occupation }}{% else %}N/A{% endif %} |
| 17. EMPLOYMENT DATES  {% if client\_is\_employed == True %}  FROM {{ employer.from\_date }}  TO {% if employer.from\_date == ‘Present’ %}{{ employer.to\_date }}{% else %}{{ employer.from\_date\_d }}{% endif %}{% else %}N/A{% endif %} | 18. SELF-EMPLOYED?  {% if client\_is\_employed == True %}  {{ employer.self }}{% else %}N/A{% endif %} |
| 19. SPOUSE’S EMPLOYER NAME AND ADDRESS (YOUR SPOUSE IS NOT RESPONSIBLE FOR PAYING YOUR PAST-DUE CHILD SUPPORT, BUT YOUR SPOUSE’S INCOME IS RELEVANT TO ASSESSING YOUR FINANCIAL CONDITION, INCLUDING YOUR STANDARD OF LIVING, AS IT RELATES TO YOUR ABILITY TO PAY YOUR CHILD SUPPORT)  {% if is\_spouse\_employed == True %}  {{ spouse\_employer.name }}  {{ spouse\_employer.address.address }}  {{ spouse\_employer.address.city }} {{ spouse\_employer.address.state }} {{ spouse\_employer.address.zip }}  {% else %}N/A{% endif %} | | |
| 20. SPOUSE’S MONTHLY INCOME  {{ currency(spouse\_monthly\_income) }} | 21. SOURCE OF SPOUSE’S MONTHLY INCOME (IF OTHER THAN FROM EMPLOYMENT)  {{ spouse\_monthly\_income\_source }} | |

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| SECTION IV – ASSETS | | | | | | | | | | | | | | |
| 22. VEHICLES (AUTOMOBILES, MOTORCYCLES, MOTORHOMES, CAMPERS, BOATS, TRAILERS, SNOWMOBILES, ETC.) | | | | | | | | | | | | | | |
| DESCRIPTION | MAKE | MODEL | | | YEAR | OWN / LEASE | | | LICENSE PLATE # | | CURRENT VALUE | | | AMOUNT OWED ON LOAN |
| {% if hasvehicles == True %}{% for v in vehicles %}{{ vehicles.item(v).description }} | {{ vehicles.item(v).make }} | {{ vehicles.item(v).model}} | | | {{ vehicles.item(v).year }} | {{ vehicles.item(v).own\_lease }} | | | {{ vehicles.item(v).license\_plate }} | | {{ currency(vehicles.item(v).current\_value) }} | | | {{ currency(vehicles.item(v).amt\_owed) }} |
| {% endfor %}{% endif %} |  |  | | |  |  | | |  | |  | | |  |
| 23. CASH {{ currency(cash\_on\_hand) }} | | | | | | | | | | | | | | |
| 24. DO YOU RENT A SAFE DEPOSIT BOX? (LIST ALL LOCATIONS, BOX NUMBERS AND CONTENTS)  {{ has\_safe\_deposit\_box }}{% if has\_safe\_deposit\_box == “Yes” %}  Location: {{ safe\_deposit\_location }}  Box Number: {{ safe\_deposit\_number }}  Contents:  {{ safe\_deposit\_contents }}  {% endif %} | | | | | | | | | | | | | | |
| 25. REAL PROPERTY (RESIDENCE, VACATION HOME, RENTAL PROPERTY, UNIMPROVED LAND, ETC.) | | | | | | | | | | | | | | |
| Description | | | Address | | | | Current Market Value | | | Amount owed on mortgage | | | equity in property | |
| {% if hasprop == True %}{% for r in realprop %}{{ realprop.item(r).description }} | | | {{ realprop.item(r).address }}  {{ realprop.item(r).city }}, {{ realprop.item(r).state }} {{ realprop.item(r).zip }} | | | | {{ currency(realprop.item(r).current\_value) }} | | | {{ currency(realprop.item(r).amt\_owed) }} | | | {{ currency(realprop.item(r).equity) }} | |
| {% endfor %} {% endif %} | | |  | | | |  | | |  | | |  | |
| Is a foreclosure proceeding pending on any real estate that you own or have an interest in? {{ forclosure\_yesno }} | | | | | | | | | | | | | | |
| 26. Bank accounts (checking, savings, money market accounts, certificates of deposit, etc.) | | | | | | | | | | | | | | |
| name of financial institution | | | account number | | | | | type of account | | | | balance | | |
| {% if hasbank == True %}{% for b in bankact %}{{ bankact.item(b).bank\_name }} | | | {{ bankact.item(b).act\_number }} | | | | | {{ bankact.item(b).act\_type }} | | | | {{ currency(bankact.item(b).balance) }} | | |
| {% endfor %} {% endif %} | | |  | | | | |  | | | |  | | |
| 27. retirement accounts (ira, keogh, 401k, profit-sharing, pension, etc.) | | | | | | | | | | | | | | |
| name of financial institution | | | | account number | | | | type of account | | | | balance | | |
| {% if hasretirement == True %}{% for re in retirement\_acts %}{{ retirement\_acts.item(re). name }} | | | | {{ retirement\_acts.item(re).act\_number }} | | | | {{ retirement\_acts.item(re).act\_type }} | | | | {{ currency(retirement\_acts.item(re).balance) }} | | |
| {% endfor %} {% endif %} | | | |  | | | |  | | | |  | | |
| 28. securities (stocks, bonds, mutual funds, etc.) | | | | | | | | | | | | | | |
| type | | | | issuer | | | | quantity of denomination | | | | current value | | |
| {% if hassecurities == True %}{% for se in securities %}{{ securities.item(se).type }} | | | | {{ securities.item(se).issuer }} | | | | {{ securities.item(se).quant }} | | | | {{ currency(securities.item(se).cur\_val) }} | | |
| {% endfor %} {% endif %} | | | |  | | | |  | | | |  | | |
| 29 VALUE OF OTHER ASSETS | | | | | | | | | | | | | | |
| NOTES RECEIVABLE {{ currency(notes\_receivable) }} | | | | | | | | JUDGEMENTS AND SETTLEMENTS {{ currency(judg\_settle) }} | | | | | | |
| LIFE INSURANCE (CASH VALUE) {{ currency(life\_ins) }} | | | | | | | | COLLECTABLES, ANTIQUES, OR ART {{ currency(collects) }} | | | | | | |
| HOUSEHOLD FURNISHINGS {{ currency(furnishings) }} | | | | | | | | OTHER (SPECIFY)  {{ other\_specify }} – {{ currency(other\_value) }} | | | | | | |
| 30. OTHER INFORMATION | | | | | | | | | | | | | | |
| IS ANYONE HOLDING ANY ASSETS ON YOUR BEHALF?  {{ anyone\_else\_hold\_assets }} | | | | | | | | | | | | | | |
| ARE YOU A PARTY TO ANY LAWSUIT NOW PENDING?  {{ party\_to\_lawsuit }} | | | | | | | | | | | | | | |
| DO YOU HAVE ANY TYPE OF INSURANCE CLAIM PENDING?  {{ any\_insurance\_claim }} | | | | | | | | | | | | | | |
| IS THERE ANY LIKLIHOOD OF RECEIVING AN INHERITANCE IN THE NEXT 5 YEARS?  {{ any\_inheritance\_likely }} | | | | | | | | | | | | | | |
| DO YOU HAVE A PENDING BANKRUPTCY CASE IN  U.S. BANKRUPTCY COURT?  {{ bankruptcy\_case\_pending }} {% if bankruptcy\_case\_pending == ‘Yes’ %}  Type: {{ bankruptcy\_type }}  Case Number: {{ bankruptcy\_case\_no }}  {% endif %} | | | | | | | | | | | | | | |

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| SECTION V - LIABILITIES | | | | |
| 31. LOANS, NOTES, AND OTHER ACCOUNTS PAYABLE | | | | |
| DESCRIPTION | TOTAL AMOUNT OWED | MONTHLY PAYMENT | NAME OF LENDER | PURPOSE OF LOAN |
| PERSONAL OR STUDENT LOANS | {{ currency(student\_loan\_amt\_owed) }} | {{ currency(student\_loan\_monthly\_payment) }} | {{ student\_loan\_lender\_name }} | {{ student\_loan\_purpose }} |
| NOTES PAYABLE | {{ currency(note\_payable\_amt\_owed) }} | {{ currency(note\_payable\_monthly\_payment) }} | {{ note\_payable\_lender\_name }} | {{ note\_payable\_loan\_purpose }} |
| AUTOMOBILE LOANS | {{ currency(auto\_loan\_amt\_owed) }} | {{ currency(auto\_loan\_monthly\_payment) }} | {{ auto\_loan\_lender\_name }} | {{ auto\_loan\_purpose }} |
| OTHER | {{ currency(other\_loan\_amt\_owed) }} | {{ currency(other\_loan\_monthly\_payment) }} | {{ other\_loan\_lender\_name }} | {{ other\_loan\_purpose }} |
| 32. BANK CREDIT CARDS (VISA, MASTERCARD, ETC.) | | | | |
| NAME OF ISSUER | ACCOUNT NUMBER | MONTHLY PAYMENT | CREDIT LIMIT | TOTAL AMOUNT OWED |
| {% if has\_credit\_cards == True %}{% for cc in credit\_cards %} {{ credit\_cards.item(cc).issuer }} | {{ credit\_cards.item(cc).account\_no }} | {{ currency(credit\_cards.item(cc).monthly\_payment) }} | {{ currency(credit\_cards.item(cc).credit\_limit) }} | {{ currency(credit\_cards.item(cc).total\_amt\_owed) }} |
| {% endfor %}{% endif %} |  |  |  |  |

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| SECTION VI – INCOME AND EXPENSES | | | | | | | | | |
| 33. Income | | | | | | 34. NECESSARY LIVING EXPENSES | | | |
| TYPE | | SOURCE / PAYOR OF INCOME | | GROSS / MONTH | | TYPE | | | MONTHLY AMOUNT |
| BASE PAY FROM  \_\_ SALARY \_\_ WAGES | | {{ base\_pay\_source }} | | {{ currency(base\_pay\_gross\_monthly) }} | | RENT OR MORTGAGE | | | {{ currency(rent\_mort\_monthly) }} |
| COMMISSIONS / BONUSES / TIPS | | {{ tips\_source }} | | {{ currency(tips\_gross\_monthly) }} | | HOMEOWNER’S/TENANT INSURANCE | | | {{ currency(home\_ins\_montly) }} |
| SOCIAL SECURITY | | {{ ssi\_source }} | | {% if ssi\_source != ‘N/A’ %}{{ currency(ssi\_ssdi\_gross\_monthly) }}{% else %} {% endif %} | | WATER | | | {{ currency(water\_bill\_monthly) }} |
| SOCIAL SECURITY (RETIREMENT) | | {{ ss\_retirement\_source }} | | {{ currency(ss\_retirement\_gross\_monthly) }} | | ELECTRICITY | | | {{ currency(electric\_monthly) }} |
| DISABILITY BENEFITS | | {{ disability\_benefits\_source }} | | {{ currency(disability\_gross\_monthly) }} | | HEAT | | | {{ currency( heat\_monthly) }} |
| WORKER’S COMPENSATION | | {{ workers\_comp\_source }} | | {{ currency(workers\_comp\_gross\_monthly) }} | | TELEPHONE | | | {{ currency(phone\_monthly) }} |
| UNEMPLOYMENT BENEFITS | | {{ unemploy\_source }} | | {{ currency(unemployment\_gross\_monthly) }} | | GROCERIES | | | {{ currency(groceries\_monthly) }} |
| PENSION/RETIREMENT FUNDS | | {{ pension\_retire\_source }} | | {{ currency(pension\_retire\_gross\_monthly)}} | | CLOTHING | | | {{ currency(clothing\_monthly) }} |
| RENTAL INCOME | | {{ rental\_income\_source }} | | {{ currency(rental\_income\_gross\_monthly) }} | | LIFE INSURANCE | | | {{ currency(life\_ins\_monthly) }} |
| PUBLIC ASSISTANCE | | {{ public\_assistance\_source }} | | {{ currency(public\_assistance\_gross\_monthly) }} | | AUTO INSURANCE | | | {{ currency(auto\_ins\_monthly) }} |
| \_\_ ANNUITIES \_\_ TRUSTS | | {{ annuities\_trusts\_source }} | | {{ currency(annuities\_trusts\_gross\_monthly) }} | | CHILD SUPPORT OR ALIMONY | | | Is this child support for other children or the children at the top? |
| \_\_ DIVIDENDS \_\_ INTEREST | | {{ dividends\_interest\_source }} | | {{ currency(dividends\_interest\_gross\_monthly) }} | | TRANSPORTATION | | | {{ currency(transpo\_monthly) }} |
| VETERAN’S BENEFITS  \_\_ STATE \_\_ FEDERAL | | {{ vet\_benefit\_source }} | | {{ currency(vet\_benefit\_gross\_monthly) }} | | MEDICAL INSURANCE (IF NOT DEDUCTED FROM GROSS PAY) | | | {{ currency(med\_ins\_monthly) }} |
| CONTRIBUTIONS FROM HOUSEHOLD MEMBERS | | {{ hh\_member\_contrib\_source }} | | {{ currency(hh\_member\_contrib\_gross\_monthly) }} | | UNINSURED MEDICAL EXPENSES (INCLUDING PHARMACY AND MEDICAL SUPPLIES) | | | {{ currency(med\_expenses\_monthly) }} |
| ROYALTIES OR OTHER RIGHTS | | {{ royalties\_source }} | | {{ currency(royalties\_gross\_monthly) }} | | OTHER | | | {{ currency(other\_exp\_1\_monthly) }} |
| OTHER | | {{ other\_source }} | | {{ currency(other\_gross\_monthly) }} | | OTHER | | | {{ currency(other\_exp\_2\_monthly) }} |
| TOTAL MONTHLY INCOME | |  | |  | | TOTAL MONTHLY EXPENSES | | |  |
| 35. DEDUCTIONS FROM GROSS PAY (IF EARNING WAGES OR SALARY) | | | | | | | | | |
| DESCRIPTION | MONTHLY AMOUNT | | DESCRIPTION | | MONTHLY AMOUNT | | DESCRIPTION | MONTHLY AMOUNT | |
| FEDERAL TAXES | {{ currency(fed\_tax\_ded\_monthly) }} | | FICA AND MEDICARE | | {{ currency(fica\_medicare\_ded\_monthly) }} | | DISABILITY INSURANCE | {{ currency(disability\_ins\_ded\_monthly) }} | |
| STATE TAXES | {{ currency(state\_tax\_ded\_monthly) }} | | UNION DUES | | {{ currency(union\_dues\_ded\_monthly) }} | | RETIREMENT | {{ currency(retirement\_ded\_monthly) }} | |
| MEDICAL INSURANCE | {{ currency(med\_ins\_ded\_monthly) }} | | LIFE INSURANCE | | {{ currency(life\_ins\_ded\_monthly) }} | | OTHER | {{ currency(other\_ded\_monthly) }} | |

Under the pains and penalties of perjury, I declare that to the best of my knowledge and belief this statement of financial condition is true, correct, and complete.