

COVER PAGE

Please complete this form to the best of your ability. Attach additional pages as needed. It is expected that this form will be completed through a few rounds of fact gathering and discussion.

Once complete and agreed upon by both parties, each spouse will initial each page and sign the declaration on the last page.

The information on the complete and signed form will become the core of the Marriage Settlement Agreement.

The following Definitions will help you as you complete these forms. Note that specific wording will vary from state to state. Accordingly, these definitions are intended as guidance only.

Date of Separation. This is the date when one spouse made the firm commitment that the marriage was at an end. It must post-date the cessation of intimate relations. Some states further require informing the other spouse. Other states also require a physical relocation of a spouse. When completing this form, give both the date and the basis used for selecting that date.

Marital Property. Property acquired by the spouses during the marriage regardless of how titled. Most states do not include property received through gift or inheritance. Income derived from labor during marriage (such as wages) is marital property. Separate property may become marital property through commingling or donation. Note that property may have both marital and separate property components.

Personal Property. Tangible physical property (such as cars, clothing, furniture, and jewelry) and intangible personal property (such as copyrights or patents). This does not include real property such as land or rights in land, nor items fixed to real property.

Real Property. Land and generally whatever is erected or affixed to the land, such as buildings, fences and including light fixtures, plumbing and heating fixtures or other items which would be personal property if not attached.

Separate Property. Property owned by a spouse prior to the marriage of the parties, property acquired by gift, devise or bequest, or property excluded from marital property by a valid agreement of the parties (such as a valid pre- or post-nuptial agreement). Note that property may have both marital and separate property components.

If you have any questions or concerns, please call or e-mail your Mediator.

MARRIAGE INFORMATION

	Spouse 1	Spouse 2
Name		
Current Address		
Home Phone		
Work Phone		
Cell Phone		
e-address		
Date of Birth		
Gender		
SS Number		
Previous Marriage		
Name of Spouse		
Date of Marriage		
Date of Dissolution		
County & State of Dissolution		
This Marriage		
Date of Marriage		
County & State		
Date of Separation (see Definitions)		

Is there a prenuptial or postnuptial agreement? If "Yes," please provide a true and accurate copy. ___ Yes or ___ No.

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CHILDREN

Child #1	
Full Name	
Date of Birth	
Gender	
Birth Parents	
Adoptive Parents	
Special Medical Conditions	
Other Considerations	
Intended Custodial Arrangements	

Child #2	
Full Name	
Date of Birth	
Gender	
Birth Parents	
Adoptive Parents	
Special Medical Conditions	
Other Considerations	
Intended Custodial Arrangements	

Child #3	
Full Name	
Date of Birth	
Gender	
Birth Parents	
Adoptive Parents	
Special Medical Conditions	
Other Considerations	
Intended Custodial Arrangements	

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REAL ESTATE

Parcel No. 1, known as:	
Location	
Description	
Date Acquired	
Purchase Price	
Cost of Improvements	
Fair Market Value	
Balance on Mortgage	
Arrears on Property Taxes	
Names and type of ownership	
Describe any "separate property" interest.	
Intended disposition of property	
Title	
Mortgage	
Maintenance	
Expenses	

Parcel No. 2, known as:	
Location	
Description	
Date Acquired	
Purchase Price	
Cost of Improvements	
Fair Market Value	
Balance on Mortgage	
Arrears on Property Taxes	
Names and type of ownership	
Describe any "separate property" interest.	
Intended disposition of property	
Title	
Mortgage	
Maintenance	
Expenses	

PERSONAL PROPERTY

A. PERSONAL PROPERTY LOCATED ON OWNED, LEASED, OR RENTED REAL PROPERTY

Spouse 1 and Spouse 2 jointly or separately own the personal property that is located in or on the parcels of real estate owned, leased, or rented by Spouse 1 or Spouse 2. By writing the description of an item under, for example, "To Spouse 1," it will be interpreted that sole ownership and possession will be in Spouse 1. Any debts associated with such items (loans, secured interests) must be noted along with the item, giving the most-current outstanding balance. Indicate any claimed "separate property" interest.

1) To Spouse 1:

2) To Spouse 2:

B. AUTOMOBILES

Spouse 1 and Spouse 2 jointly or separately own the following automobiles to be divided as indicated below. Indicate make, model, year, odometer reading, and general condition. Any debts associated with such items (car loans, secured interests) must be noted along with the item, giving the most-current outstanding balance. Indicate any claimed "separate property" interest.

1) To Spouse 1:

2) To Spouse 2:

C. OTHER PERSONAL PROPERTY

Spouse 1 and Spouse 2 jointly or separately own the following other personal property to be divided as indicated below. Any debts associated with such items (loans, secured interests) must be noted along with the item, giving the most-current outstanding balance. Indicate any claimed “separate property” interest.

1) To Spouse 1:

2) To Spouse 2:

D. BUSINESS INTERESTS

Do either or both Spouse 1 and Spouse 2 hold any present or contingent interest in a business? If “Yes,” please describe the business, the present ownership interest, and the post-agreement ownership interest. Additional information may be needed to establish a value of the present and post-agreement interests if either Spouse 1 or Spouse 2 requests.

E. BANK ACCOUNTS

Spouse 1 and Spouse 2 jointly or separately hold the following bank accounts:

(Account Number)
(Account Balance)
(Institution Name & Address)

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(Account Number)
(Account Balance)
(Institution Name & Address)

(Account Number)
(Account Balance)
(Institution Name & Address)

The above mentioned accounts shall be divided as follows:

1) To Spouse 1:

2) To Spouse 2:

F. INVESTMENT ACCOUNTS

Spouse 1 and Spouse 2 jointly or separately hold the following investment accounts:

(Account Number)
(Account Balance)
(Institution Name & Address)

(Account Number)
(Account Balance)
(Institution Name & Address)

(Account Number)
(Account Balance)
(Institution Name & Address)

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The above mentioned accounts shall be divided as follows:

1) To Spouse 1:

2) To Spouse 2:

G. SAFETY DEPOSIT BOXES

(Institution Name & Address)

(Box Number & Location of Key)

(Contents)

1) To Spouse 1:

2) To Spouse 2:

H. PENSION PLANS AND OTHER SOURCES OF DEFERRED INCOME.

Spouse 1 and Spouse 2 jointly or separately hold the following pension plan accounts or rights to deferred income:

(Account Number)

(Account Balance & Vested Amount)

(Institution Name & Address)

(Account Number)

(Account Balance & Vested Amount)

(Institution Name & Address)

(Account Number)

(Account Balance & Vested Amount)

(Institution Name & Address)

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The above mentioned accounts shall be divided as follows:

1) To Spouse 1:

2) To Spouse 2:

I. LIFE INSURANCE

1) Spouse 1 owns the following life insurance policies naming Spouse 2 as beneficiary:

_____ (Policy Number)
_____ (Death Benefit)
_____ (Liquidation Value)
_____ (Institution Name & Address)

_____ (Policy Number)
_____ (Death Benefit)
_____ (Liquidation Value)
_____ (Institution Name & Address)

_____ (Policy Number)
_____ (Death Benefit)
_____ (Liquidation Value)
_____ (Institution Name & Address)

Spouse 1 agrees that Spouse 2 [*check one:*] _____ shall or _____ shall not remain the beneficiary of the following life insurance policies:

2) Spouse 2 owns the following life insurance policies naming Spouse 1 as beneficiary:

_____ (Policy Number)
_____ (Death Benefit)

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_____ (Liquidation Value)

_____ (Institution Name & Address)

_____ (Policy Number)

_____ (Death Benefit)

_____ (Liquidation Value)

_____ (Institution Name & Address)

_____ (Policy Number)

_____ (Death Benefit)

_____ (Liquidation Value)

_____ (Institution Name & Address)

Spouse 2 agrees that Spouse 1 [*check one:*] _____ shall or _____ shall not remain the beneficiary of the following life insurance policies:

Are there any other life insurance policies under which Spouse 1 or Spouse 2 may receive a death benefit from the passing of the other? If "Yes," please describe in detail.

J. OTHER ASSETS NOT DISCUSSED ABOVE (INCLUDING NOTES RECEIVABLE, BONUSES, INTELLECTUAL PROPERTY).

DEBTS

A. INCOME TAX LIABILITY

Spouse 1 and Spouse 2 agree that any joint tax liability attributable to the period of the marriage shall be assumed as follows:

1) By Spouse 1:

2) By Spouse 2:

B. OTHER DEBTS NOT DISCUSSED ABOVE

Spouse 1 and Spouse 2 jointly or separately hold the following debts outstanding:

(Account Number)
(Account Balance)
(Institution Name & Address)

(Account Number)
(Account Balance)
(Institution Name & Address)

(Account Number)
(Account Balance)
(Institution Name & Address)

(Account Number)
(Account Balance)
(Institution Name & Address)

(Account Number)
(Account Balance)
(Institution Name & Address)

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The above mentioned debts shall be divided as follows:

1) Spouse 1 agrees to pay and assume all responsibility for the following debts:

2) Spouse 2 agrees to pay and assume all responsibility for the following debts:

C. DEBTS NOT EVIDENCED BY A NOTE:

The above mentioned debts shall be divided as follows:

1) Spouse 1 agrees to pay and assume all responsibility for the following debts:

2) Spouse 2 agrees to pay and assume all responsibility for the following debts:

D. IS EITHER SPOUSE A GUARANTOR ON ANY DEBTS OF ANOTHER PERSON?

Spouse 1 and Spouse 2 agree that from the date of this agreement neither shall assume any joint debt or liability. Spouse 1 and Spouse 2 agree that each shall be individually responsible for all debts that he or she incurs subsequent to the date of these disclosures.

OTHER ISSUES

A. HEALTH INSURANCE

Spouse 1 and Spouse 2 agree as follows in relation to their respective health care coverage:

B. SPOUSAL SUPPORT

1) Spouse 1 shall pay to Spouse 2 spousal support in the periodic sum of _____ dollars (\$ _____), _____ [specify “weekly” or “monthly”], beginning on the _____ [specify date of first payment]. The last payment to Spouse 2 shall be made on _____ [specify date], subject to the following mutually agreed upon conditions:

2) Spouse 2 shall pay to Spouse 1 spousal support in the periodic sum of _____ dollars (\$ _____), _____ [specify “weekly” or “monthly”], beginning on the _____ [specify date of first payment]. The last payment to Spouse 1 shall be made on _____ [specify date], subject to the following mutually agreed upon conditions:

C. LEGAL NAME

Spouse 1 and Spouse 2 agree that that upon final divorce or dissolution of the marriage, Spouse ___ shall retain his or her married name or shall return to his or her former name: _____ [insert former name if reverting].

D. ADDITIONAL COMMENTS BY SPOUSE 1:

E. ADDITIONAL COMMENTS BY SPOUSE 2:

DECLARATION

I state that I have completed this disclosure of assets and liabilities completely and accurately. I affirmatively state that to the best of knowledge there are no undisclosed assets or liabilities that my spouse may benefit from or be liable for except for those disclosed above or in the attached documents.

Spouse 1

Spouse 2

Date

Date

