

The Law Office of Marcus W. Meetze, LLC

NEW FAMILY LAW CLIENT - FINANCIAL INFORMATION SHEET

GROSS MONTHLY INCOME		
Gross Monthly Income	Husband/ Father	Wife/ Mother
Principal Earnings from Employment	\$	\$
Overtime, Tips, Commissions, Bonuses	\$	\$
Pension, Retirement, and Annuities	\$	\$
Additional Employment Income	\$	\$
SSA/ VA Benefits	\$	\$
Disability/ Worker's Comp	\$	\$
Unemployment and AFDC	\$	\$
Spousal or Child Support (from other marriage)	\$	\$
Dividends, Trust, Capital Gains	\$	\$
Rental Income and Business Profits	\$	\$
Other:	\$	\$
Total Gross Monthly Income	\$	\$

NET MONTHLY INCOME		
Payroll Deductions from Monthly Income	Husband/ Father	Wife/ Mother
Federal Income Tax	\$	\$
State Income Tax	\$	\$
Social Security/ Medicare (FICA)	\$	\$
Self-Employment Tax	\$	\$
Health and Dental (Adult)	\$	\$
Health and Dental (Children)	\$	\$
Union Dues	\$	\$
Voluntary Retirement (401K/ IRA)	\$	\$
Mandatory Retirement	\$	\$
Savings Plan	\$	\$
Other:	\$	\$
TOTAL MONTHLY DEDUCTIONS	\$	\$
NET MONTHLY INCOME	\$	\$

ASSETS

FINANCIAL ACCOUNTS INFORMATION						
Assets	Husband/ Father		Wife/ Mother		Joint	
	Name of Institution & Account Number	Value	Name of Institution & Account Number	Value	Name of Institution & Account Number	Value
Checking Account(s)		\$		\$		
Savings Account(s)		\$		\$		
Retirement Account(s)		\$		\$		
Pension Account(s)		\$		\$		
Publicly Held Stocks		\$		\$		
Privately Held Stocks		\$		\$		
Real Estate – Net of Mortgage		\$		\$		
All Other Property		\$		\$		
TOTAL ASSETS	\$		\$		\$	

REAL ESTATE INFORMATION				
Owner	Address	Fair Market Value	Mortgage Balance	Mortgage Equity
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$

AUTOMOBILE INFORMATION				
Owner (Husband/ Wife/ Joint)	Make	Model	Year	Lien Balance
				\$
				\$
				\$

