

The Family Court sitting at	Case No.
Name of applicant	
Name of respondent	

Financial Statement of

Dated

The applicant is

The respondent is

Who is the husband/wife/civil partner/ex husband/
husband/ex wife/ ex civil partner/father/mother of ...
..

Who is the husband/wife/civil partner/ex
husband/ ex wife/ex civil partner/mother/ father of

You should complete this form if you are applying for a financial order or remedy in the Family Court or for an Order for financial provision for a child under the provisions of Schedule 1 to the Children Act 1989.

IMPORTANT NOTICE

It is important that this form is completed fully and accurately. Where any box is not applicable write "N/A", rather than leave it blank.

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

Failure to give a full and accurate picture of your financial position and other relevant matters can have serious consequences including:-

- The possibility of a Court setting aside any order that has been made;
- The risk of criminal or civil proceedings being brought against you;
- Being sent to prison for disobeying a court order.

Some parts of the form ask you to attach specific and specified documentation. Please ensure that you do this. You can attach other documents if it is necessary to explain or clarify any of the information that you give.

If there is not enough room in the form for a particular piece of information you may continue on a separate sheet of paper which should be attached to this form.

If you are in any doubt about how to complete any part of this form you should seek legal advice. Once you have completed the form you should send it to the Court and send a copy to the other party, with the attachments in each case.

This statement is sent to the Court by

a
name and contact details of applicant/respondent or
solicitor if instructed

General Information

1.1 About You

Your Full Name

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Your Date of Birth

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Your Occupation

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1.2 Only answer this section if you are or were married or are/were in a civil partnership with the other party

Date of the marriage/
Civil partnership

Day	Month	Year
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If you have separated the date
of the separation

Day	Month	Year
-----	-------	------

The date of the Petition for
divorce/dissolution/nullity or
judicial separation if
proceedings have been started

Day	Month	Year
-----	-------	------

The date of decree
nisi/conditional order/judicial
separation order if granted

Day	Month	Year
-----	-------	------

The date of the decree
absolute/final order if made

Day	Month	Year
-----	-------	------

If you have remarried or formed
a new civil partnership when
did this take place

Day	Month	Year
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Are you living with a new partner?	Yes	No
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Do you intend to live with a new partner within the next six months?	Yes	No
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1.3 Only complete this section if you were not married to the other party

Did you live with the other Party?	Yes	No
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If yes, when did you start living with the other party?	Day	Month	Year
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If you no longer live with the other party when did you separate?	Day	Month	Year
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1.4

Details of the children who are concerned in this application	Full Names		Date of Birth			With whom does the child live?
			Day	Month	Year	

1.5

Details of your state of health and the children if you think this should be taken into account	Yourself	Children

Details of the present and proposed future educational arrangements for the children	Present arrangements	Future arrangements

Details of any child support maintenance calculation or any maintenance order or agreement made in respect of any children of the family. If no calculation, order or agreement has been made, give an

estimate of the liability of the non-resident parent in respect of the children of the family under the Child Support Act 1991

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If this application is to vary an Order, attach a copy of the order and give details of the part that is to be varied and the changes sought. You may need to continue on a separate sheet.

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Details of any other court cases between you and your spouse/civil partner, or other party whether in relation to money, property, children or anything else.

Case No.	Court	Type of proceedings

Your present residence and the occupants of it and on what terms you occupy it (e.g. tenant, owner-occupier)

Address	Occupants	Terms of occupation

2 Financial Details Part 1

Real property (land and buildings) and Personal Assets

2.1 Complete this section in respect of the family home (the last family home occupied by you and your spouse/civil partner or other party) if it remains unsold.

Property name and address	
Land Registry title number	
Mortgage company name(s) and address(es) and account number(s)	
Type of mortgage	
Details of who owns the property and the extent of your legal and beneficial interest in it (i.e. state if it is owned by you or solely or jointly owned with your spouse/civil partner or with others)	
If you consider that the legal ownership as recorded at the Land Registry does not reflect the true position, state why	
Current market value of the property	
If a sale at this stage would result in penalties payable under the mortgage, state the amount	
Estimate the costs of sale of the property	
Total equity in the property (i.e. market value less outstanding mortgage(s), penalties if any and the costs of sale)	
Estimated TOTAL of your interest in the family home: TOTAL A:	£

2.2 Details of your interest in any other property, land or buildings. Complete one page for each property you have an interest in.

Property name and address	
Land Registry title number	
Mortgage company name(s) and address(es) and account number(s)	
Type of mortgage	
Details of who owns the property and the extent of your legal and beneficial interest in it (i.e. state if it is owned by you or solely or jointly owned with your spouse/civil partner or with others)	
If you consider that the legal ownership as recorded at the Land Registry does not reflect the true position, state why	
Current market value of the property	
If a sale at this stage would result in penalties payable under the mortgage, state the amount	
Estimate the costs of sale of the property	
Total equity in the property (i.e. market value less outstanding mortgage(s), penalties if any and the costs of sale)	
Estimated TOTAL of your interest in the family home: TOTAL B:	£

2.3 Details of all personal bank, building society and National Savings Accounts that you hold or have held at any time in the last twelve months and which are or were either in your own name or in which you have or have had any interest. This applies whether any such account is in credit or in debit. For joint accounts give your interest and the name of the other account holder. If the account is overdrawn, show a minus figure.

Name of bank or building society including branch name	Type of account (eg current)	Account number	Name of other account holder (if applicable)	Balance at the date of this statement	Total current value of your interest

TOTAL value of your interest in ALL accounts: (C1): £

2.4 Details of all investments, including shares, PEPs, ISAs, TESSAs, National Savings Investments (other than already shown above), bonds, stocks, unit trusts, investment trusts, gilts and other quoted securities that you hold or have an interest in. (Do not include dividend income as this will be dealt with separately later on).

Name	Type of Investment	Size of Holding	Current value	Name of any other account holder (if applicable)	Total current value of your interest

TOTAL value of your interest in ALL accounts: (C2): £

2.5 Details of all life insurance policies including endowment policies that you hold or have an interest in. Include those that do not have a surrender value. Complete one page for each policy.

Name of company	
Policy type	
Policy number	
Type of mortgage	
If policy is assigned, state in whose favour and amount of charge	
Name of any other owner and the extent of your interest in the policy	
Maturity date (if applicable)	
Current surrender value (if applicable)	
If policy includes life insurance, the amount of the life insurance and the name of the person whose life is insured	
Total current surrender value of your interest in this policy	
TOTAL value of your interest in ALL policies: (C3):	
	£

2.6 Details of all monies that are OWED TO YOU. Do not include sums owed in director's or partnership accounts which should be included at section 2.11.

Brief description of money owned and by whom	Balance outstanding	Total current value of your interest
TOTAL value of your interest in ALL debts owned to you: (C4):		£

2.7 Details of all cash sums held in excess of £50. You must state where it is held and the currency it is held in.

Where held	Amount	Currency	Total current value of your interest
TOTAL value of your interest in ALL accounts: (C5):			£

2.8 Details of personal belongings individually worth more than £500

INCLUDE:

- Cars (gross value
- Collections, pictures and jewellery
- Furniture and house contents

Brief description of item	Total current value of your interest
TOTAL value of your interest in ALL personal belongings: (C6): £	
Add together all the figures in boxes C1 to C6 to give the TOTAL current value of your interest in personal assets: TOTAL C £	

2 Financial Details Part 2 Capital: Liabilities and Capital Gains Tax

2.9 Details of any liabilities you have.

EXCLUDE liabilities already shown such as:

- ☐ Mortgages
- ☐ Any overdrawn bank, building society or National Savings accounts

☐ **INCLUDE:**

- ☐ Money owned on credit cards and store cards
- ☐ Bank loans
- ☐ Hire purchase agreements
- ☐ List all credit and store cards held

Liability	Name(s) of other account holder(s) (if applicable)	Total liability	Total current value of your interest in the liability

TOTAL value of your interest in ALL liabilities: (D1) £

2.10 If any Capital Gains Tax would be payable on the disposal now of any of your real property or personal assets, give your estimate of the tax liability.

Asset	Total Capital Gains Tax liability

TOTAL value of ALL your potential Capital Gains Tax liabilities: (D2): £

Add together D1 and D2 to give the TOTAL value of your liabilities: TOTAL D: £

2 Financial Details Part 3 Capital: Business assets and directorships

2.11 Details of all your business interests. Complete one page for each business you have an interest in.

Name of business	
Briefly describe the nature of the business	
Are you <i>(please delete as appropriate)</i>	Sole Trader Partner in a partnership with others Shareholder in a limited company
If you are a partner or a shareholder, state the extent of your interest in the business (i.e. partnership share or the extent of your shareholding compared to the overall shares issued)	
State when your next set of accounts will be available	
If any of the figures in the last accounts are not accurate reflection of the current position, state why.	
Total amount of any sums owed to you by the business by way of a director's loan account partnership capital or current accounts or the like	
Your estimate of the current value of your business interest. Explain briefly the basis upon which you have reached that figure	
Your estimate of any CGT that would be payable if you were to dispose of your business now	
Net value of your interest in this business after any	

Capital Gains Tax liability		
TOTAL value of ALL your interests in business assets:		
TOTAL E:		£

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

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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 entitlement. Complete a separate page for each pension or PPF compensation entitlement.

EXCLUDE

- Basic state pension

INCLUDE

- 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 scheme
- PPF compensation entitlement for each scheme you were a member of which has transferred to PPF

Name and address of pension arrangement or PPF Board	
Your National Insurance Number	
Number of pension arrangement or reference number or PPF reference number	
Type of scheme E.g. occupational or personal, final salary, money purchase, additional state pension, PPF or other	
Date the CE, PPF compensation or additional state pension was calculated	
Is the pension in payment or drawdown (yes or no)	
State the CE quotation, the additional stte 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 it not reduced. If this is not possible, please indicate if the CE quoted is a reduced CE

Is the PPF compensation capped (yes or no)

ce

**TOTAL value of ALL your pension assets:
TOTAL F:**

£

2 Financial Details Part 5 Capital: Other assets

2.14 Give details of any other assets not listed in Parts 1 to 4 above.

INCLUDE (the following list is not exhaustive)

- Any personal or business assets not yet disclosed
- Unrealisable assets
- Share option scheme, stating the estimated net sale proceeds of the shares if the options were capable of exercise now, and whether Capital Gains Tax or income tax would be payable
- Business expansion scheme
- Futures
- Commodities
- Trust interests (including interests under a discretionary trust), stating your estimate of the value of the interest and when it is likely to become realisable. If you say it will never be realisable, or has no value, give your reasons
- Any asset that is likely to be received in the foreseeable future
- Any asset held on your behalf by a third party
- Any asset not disclosed elsewhere on this form even if held outside England and Wales

You are reminded of your obligation to disclose all your financial assets and interests of ANY nature

Type of asset	Value	Total NET value of your interest

TOTAL value of ALL your other assets: TOTAL G: £

2 Financial Details Part 6 Income: Earned income from employment

2.15 Details of earned income from employment. Complete one page for each employment

Name and address of your employer	
Job title and brief details of the type of work you do	
Hours worked per week in this employment	
How long have you been with this employer	
Explain the basis of your income i.e. state whether it is based on an annual salary or an hourly rate of pay and whether it includes commissions or bonuses	
Gross income for the last financial year as shown on your P60	
Net income for the last financial year i.e. gross income less income tax and national insurance	
Average net income for the last three months i.e. total income less income tax and national insurance divided by three	
Briefly explain any other entries on the attached payslips other than basic income, income tax and national insurance	
If the payslips attached for the last three months are not accurate reflection of your normal income briefly	
Details and value of any bonuses or other occasional payments that you receive from this employment not otherwise already shown, including the basis upon which they are paid	
Details of any benefits in kind, perks or other remuneration received from this employer in the last year (e.g. provision of a car, payment of travel, accommodation, meal expenses, etc)	

Your estimate of your net income from this employment for the next 12 months. If this differs significantly from your current income explain why in box 4.1.2

Estimated TOTAL of ALL net earned income from employment for the next 12 months: TOTAL H

£

2 Financial Details Part 7 Income: Income from self-employment or partnership

2.16 You will have already given details of your business and provided the last two years accounts at section 2.11. Complete this section giving details of your income from your business. Complete one page for each business.

Name of the business	
Date to which your last accounts were completed	
Your share of gross business profit from the last completed accounts	
Income tax and national insurance payable on your share of gross business profit above	
Net income for that year (using the two figures directly above, gross business profit less income tax and national insurance payable).	
Details and value of any benefits in kind, perks or other remuneration received from this business in the last year	
Amount of any regular monthly or other drawings that you take from this business	
If the estimated figure directly below is different from the net income as at the end of date of the last completed accounts, briefly explain the reason(s)	
Your estimate of the net annual income for the next 12 months	
Estimated TOTAL of ALL net income from self-employment or partnership for the next 12 months: TOTAL I:	£

2 Financial Details Part 8 Income: Income from investments e.g. dividends, interest or rental income

2.17 Details of income received in the last financial year (the year ended last 5th April), and your estimate of your income for the current financial year. Indicate whether the income was paid gross or net of income tax. You are not required to calculate any tax payable that may arise.

Nature of income and the asset from which it derived	Paid gross or net	Income received in the last financial year	Estimated income for the next 12 months
Estimated TOTAL investment income for the next 12 months: TOTAL J:			£

2 Financial Details Part 9 Income: Income from state benefits (including state pension and child benefit)

2.18 Details of all state benefits that you are currently receiving.

Name of benefit	Amount paid	Frequency of payment	Estimated income for the next 12 months
Estimated TOTAL investment income for the next 12 months: TOTAL K:			£

2 Financial Details Part 10 Income: Any other income

2.19 Details of any other income not disclosed above.

INCLUDE:

Any source including a pension (excluding state pension), and pension protection fund (PPF) compensation

- From which income has been received during the last 12 months (even if it has now ceased)
- From which income is likely to be received during the next 12 months

You are reminded of your obligation to give full disclosure of your financial circumstances

Nature of income	Paid gross or net	Income received in the last financial year	Estimated income for the next 12 months
Estimated TOTAL investment income for the next 12 months: TOTAL L: £			

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 properties	B	
Current value of your interest in personal assets	C	
Current value of your liabilities	D	
Current value of your interest in business assets	E	
Current value of your pension and PPF compensation asset	F	
Current value of all your other assets	G	
TOTAL value of your assets (Totals A to G less 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):		£

3 Financial Requirements Part 1 Income needs

- 3.1 Income needs for yourself and any children living with you or provided for by you. ALL figures should be annual, monthly or weekly (state which). You must not use a combination of these periods. If these needs are likely to change in the near future, explain the anticipated change and give an estimate of the future cost**

<i>The income needs below are: (delete those not applicable)</i>	Weekly	Monthly	Annual
BUDGET TO GO HERE I anticipate my income needs are going to change because			

3 Financial Requirements Part 2 Capital needs

3.2 Set out below the reasonable future capital needs for yourself and for any children living with you or provided for by you.

3.2.1 Capital needs for yourself

INCLUDE:

- o All capital needs for yourself
- o Capital needs for any children living with you or provided for by you only if these form part of your total capital needs (e.g. housing, cars, etc)

Item	Cost

SUB TOTAL your capital needs: £

3.2.2 Capital needs for children living with you or provided for by you.

INCLUDE

- Only those capital needs that are different to those of your household shown above

Item	Cost

SUB-TOTAL your children's capital needs: £

TOTAL of ALL capital needs: £

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 3 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/other party during the marriage/civil partnership/relationship

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 contrition 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

- **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**

4.6 If you have subsequently married or formed a civil partnership (or intend to) or are living with another person (or intend to), give brief details, so far as they are known to you, of his or her income, assets and liabilities

[illegible]

5 Order Sought

5.1 If you are able at this stage, specify what kind of orders you are asking the court to make.

Even if you cannot be specific at this stage, if you are able to do so, indicate:

- a) If the family home is still owned, whether you are asking for it to be transferred to yourself or your spouse/civil partner/other party or whether you are saying it should be sold.**

- b) Whether you consider this is a case for continuing spousal maintenance/maintenance for your civil partner or whether you see the case as being appropriate for a ‘clean break’. (A ‘clean break’ means a settlement or order which provides amongst other things, that neither you nor your spouse/civil partner will have any further claim against the income or capital of the other party. A ‘clean break’ does not terminate the responsibility of a parent to a child. This aspect is not relevant where the application is for an order under the provisions of Schedule 1 of the Children Act 1989)**

- c) Whether you are seeking a**
- i. Pension sharing order**
 - ii. Pension attachment order**
 - iii. Pension compensation sharing order**
 - iv. Pension compensation attachment order**

This is only relevant in applications for financial orders following the breakdown of a marriage or civil partnership

- d) If you are seeking a transfer or settlement of any property or assets, identify the property or assets in question.**

- 5.2 If you are seeking a variation of an ante-nuptial or post-nuptial settlement or a relevant settlement made during, or in anticipation of, a civil partnership, identify the settlement, by whom it was made, its trustees and beneficiaries and state why you allege it is a settlement which the court can vary**

- 5.3 If you are seeking an avoidance of disposition order, or if you have already applied for such an order, identify the property to which the disposition relates and the person or body in whose favour the disposition is alleged to have been made.**

Statement of Truth

***delete as appropriate**

- * [I believe] [the Applicant/Respondent believes] that the facts stated in this statement are true
- * I am duly authorised by the Applicant/Respondent to sign this statement

And confirm that the information given above is full, frank and clear and accurate disclosure of my financial and other relevant circumstances.

Print full name

Address for service

Name of Applicant's/
Respondent's solicitor's firm

Signed

*(Applicant/Respondent

*(Applicant/Respondent's solicitor)

Dated

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