



## Sample Reports and Data Entry Screens

### Florida Forms

- Florida Affidavit 902c (long form)
- Florida Affidavit 902b (short form)
- Florida Child Support Worksheet

### Property Division

- Marital Property Division Report
- Pension Valuation Report

### Financial Reports

- One-Page Summary
- Summary Totals Spreadsheet
- Budget Report

### What If Analysis

- “What-If” Analysis
- Alimony Present Value

### Tax Analysis

- Tax Report

IN THE CIRCUIT COURT OF THE Twelfth JUDICIAL CIRCUIT,  
IN AND FOR Sarasota COUNTY, FLORIDA

Case No.: 07-32323

Division: II

Harold J Jones

Petitioner,

and

Marianne P Jones

Respondent.

**FAMILY LAW FINANCIAL AFFIDAVIT**  
(\$50,000 or more Individual Gross Annual Income)

I, *{full legal name}* Harold J Jones, being  
sworn, certify that the following information is true:

**SECTION I. INCOME**

1. Date of Birth: 4/5/1970

2. My occupation is: Building Contractor

3. I am currently

[  all that apply ]

a. Unemployed

Describe your efforts to find employment, how soon you expect to be employed, and the pay you expect to receive: \_\_\_\_\_

b. Employed by: Bilt-Rite Builders, Inc

Address: 1985 Cattlemen Rd

City, State, Zip code: Sarasota, FL 34232

Telephone Number: \_\_\_\_\_

Pay rate: \$ 175,000 ( ) every week ( ) every other week ( ) twice a month

( ) monthly ( ) other: Annual

If you are expecting to become unemployed or change jobs soon, describe the change you expect and why and how it will affect your income: \_\_\_\_\_

Check here if you currently have more than one job. List the information above for the second job(s) on a separate sheet and attach it to this affidavit.

c. Retired. Date of retirement: \_\_\_\_\_

Employer from whom retired: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip code: \_\_\_\_\_ Telephone Number: \_\_\_\_\_

**LAST YEAR'S GROSS INCOME:**

YEAR 2,006

Harold's Income  
\$ 172,000

Marianne's Income(*if known*)  
\$ 48,500

**PRESENT MONTHLY GROSS INCOME:**

All amounts must be MONTHLY. See the instructions with this form to figure out money amounts for anything that is NOT paid monthly. Attach more paper, if needed. Items included under "other" should be listed separately with separate dollar amounts.

1. Monthly gross salary or wages		1. \$ <u>14,583</u>
2. Monthly bonuses, commissions, allowances, overtime, tips, and similar payments		2. <u>667</u>
3. Monthly business income from sources such as self-employment, partnerships, close corporations, and/or independent contracts (Gross receipts minus ordinary and necessary expenses required to produce income.) ( <input type="checkbox"/> Attach sheet itemizing such income and expenses.)		3. <u>0</u>
4. Monthly disability benefits/SSI		4. <u>0</u>
5. Monthly Workers' Compensation		5. <u>0</u>
6. Monthly Unemployment Compensation		6. <u>0</u>
7. Monthly pension, retirement, or annuity payments		7. <u>0</u>
8. Monthly Social Security benefits		8. <u>0</u>
9. Monthly alimony actually received		
9a. From this case: \$ <u>0</u>		
9b. From other case(s): <u>0</u>	Add 9a and 9b	9. <u>0</u>
10. Monthly interest and dividends		10. <u>42</u>
11. Monthly rental income (gross receipts minus ordinary and necessary expenses required to produce income) ( <input type="checkbox"/> Attach sheet itemizing such income and expense items.)		11. <u>333</u>
12. Monthly income from royalties, trusts, or estates		12. <u>0</u>
13. Monthly reimbursed expenses and in-kind payments to the extent that they reduce personal living expenses ( <input type="checkbox"/> Attach sheet itemizing each item and amount.)		13. <u>0</u>
14. Monthly gains derived from dealing in property (not including nonrecurring gains)		14. <u>0</u>
Any other income of a recurring nature (identify source)		
15. _____		15. <u>0</u>
16. _____		16. <u>0</u>
<b>17. PRESENT MONTHLY GROSS INCOME (Add lines 1-16)</b>	<b>TOTAL:</b>	<b>17. \$ <u>15,625</u></b>

**PRESENT MONTHLY DEDUCTIONS:**

All amounts must be MONTHLY. See the instructions with this form to figure out money amounts for anything that is NOT paid monthly.

18. Monthly federal, state, and local income tax (corrected for filing status and allowable dependents and income tax liabilities)		
a. Filing Status <u>Single</u>		
b. Number of dependents claimed <u>2</u>		
19. Monthly FICA or self-employment taxes		18. \$ <u>3,657</u>
20. Monthly Medicare payments		19. <u>504</u>
21. Monthly mandatory union dues		20. <u>221</u>
		21. <u>0</u>

22. Monthly mandatory retirement payments	22.	<u>                    </u>	0
23. Monthly health insurance payments (including dental insurance), excluding portion paid for any minor children of this relationship	23.	<u>                    </u>	
24. Monthly court-ordered child support actually paid for children from another relationship	24.	<u>                    </u>	0
25. Monthly court-ordered alimony actually paid			
25a. from this case:           \$ <u>                    </u>			0
25b. from other case(s): <u>                    </u>			0
	Add 25a and 25b	25.	<u>                    </u>
<b>26. TOTAL DEDUCTIONS ALLOWABLE UNDER SECTION 61.30, FLORIDA STATUTES (Add lines 18 through 25)</b>	<b>TOTAL:</b>	<b>26. \$</b>	<u>                    </u> 567
<b>27. PRESENT NET MONTHLY INCOME (Subtract line 26 from line 17)</b>	<b>27. \$</b>	<u>                    </u>	4,133

**SECTION II. AVERAGE MONTHLY EXPENSES**

**Proposed/Estimated Expenses.** If this is a dissolution of marriage case **and** your expenses as listed below do not reflect what you actually pay currently, you should write "estimate" next to each amount that is estimated.

**HOUSEHOLD:**

1. Monthly mortgage or rent payments	1.	\$ <u>          </u>	4,650
2. Monthly property taxes (if not included in mortgage)	2.	<u>                    </u>	250
3. Monthly insurance on residence (if not included in mortgage)	3.	<u>                    </u>	0
4. Monthly condominium maintenance fees and homeowner's association fees	4.	<u>                    </u>	0
5. Monthly electricity	5.	<u>                    </u>	100
6. Monthly water, garbage, and sewer	6.	<u>                    </u>	0
7. Monthly telephone	7.	<u>                    </u>	70
8. Monthly fuel oil or natural gas	8.	<u>                    </u>	67
9. Monthly repairs and maintenance	9.	<u>                    </u>	0
10. Monthly lawn care	10.	<u>                    </u>	100
11. Monthly pool maintenance	11.	<u>                    </u>	0
12. Monthly pest control	12.	<u>                    </u>	0
13. Monthly misc. household	13.	<u>                    </u>	0
14. Monthly food and home supplies	14.	<u>                    </u>	347
15. Monthly meals outside home	15.	<u>                    </u>	0
16. Monthly cable t.v.	16.	<u>                    </u>	50
17. Monthly alarm service contract	17.	<u>                    </u>	0
18. Monthly service contracts on appliances	18.	<u>                    </u>	0
19. Monthly maid service	19.	<u>                    </u>	0
Other:			
20. _____	20.	<u>                    </u>	0
21. _____	21.	<u>                    </u>	0
22. _____	22.	<u>                    </u>	0
23. _____	23.	<u>                    </u>	0
24. _____	24.	<u>                    </u>	0
<b>25. SUBTOTAL (add lines 1 through 24)</b>	<b>25. \$</b>	<u>                    </u>	5,634

**AUTOMOBILE:**

26. Monthly gasoline and oil	26. \$	0
27. Monthly repairs	27.	0
28. Monthly auto tags and emission testing	28.	0
29. Monthly insurance	29.	42
30. Monthly payments (lease or financing)	30.	350
31. Monthly rental/replacements	31.	0
32. Monthly alternative transportation (bus, rail, car pool, etc.)	32.	0
33. Monthly tolls and parking	33.	0
34. Other: _____	34.	0
<b>35.</b>	<b>SUBTOTAL (add lines 26 through 34)</b>	<b>35. \$ 392</b>

**MONTHLY EXPENSES FOR CHILDREN COMMON TO BOTH PARTIES:**

36. Monthly nursery, babysitting, or day care	36. \$	477
37. Monthly school tuition	37.	435
38. Monthly school supplies, books, and fees	38.	0
39. Monthly after school activities	39.	0
40. Monthly lunch money	40.	0
41. Monthly private lessons or tutoring	41.	0
42. Monthly allowances	42.	0
43. Monthly clothing and uniforms	43.	0
44. Monthly entertainment (movies, parties, etc.)	44.	0
45. Monthly health insurance	45.	0
46. Monthly medical, dental, prescriptions (nonreimbursed only)	46.	0
47. Monthly psychiatric/psychological/counselor	47.	0
48. Monthly orthodontic	48.	0
49. Monthly vitamins	49.	0
50. Monthly beauty parlor/barber shop	50.	0
51. Monthly nonprescription medication	51.	0
52. Monthly cosmetics, toiletries, and sundries	52.	0
53. Monthly gifts from child(ren) to others (other children, relatives, teachers, etc.)	53.	0
54. Monthly camp or summer activities	54.	0
55. Monthly clubs (Boy/Girl Scouts, etc.)	55.	0
56. Monthly access expenses (for nonresidential parent)	56.	0
57. Monthly miscellaneous	57.	0
<b>58.</b>	<b>SUBTOTAL (add lines 36 through 57)</b>	<b>58. \$ 912</b>

**MONTHLY EXPENSES FOR CHILD(REN) FROM ANOTHER RELATIONSHIP:**

(other than court-ordered child support)

59. _____	59. \$	0
60. _____	60.	0
61. _____	61.	0
62. _____	62.	0
<b>63.</b>	<b>SUBTOTAL (add lines 59 through 62)</b>	<b>63. \$ 0</b>

**MONTHLY INSURANCE:**

64. Health insurance, excluding portion paid for any minor child(ren) of this relationship	64. \$	<u>0</u>
65. Life insurance	65.	<u>0</u>
66. Dental insurance	66.	<u>0</u>
Other:		
67. _____	67.	<u>0</u>
68. _____	68.	<u>0</u>
<b>69.</b>	<b>SUBTOTAL (add lines 64 through 68)</b>	<b>69. \$</b> <u>0</u>

**OTHER MONTHLY EXPENSES NOT LISTED ABOVE:**

70. Monthly dry cleaning and laundry	70. \$	<u>0</u>
71. Monthly clothing	71.	<u>0</u>
72. Monthly medical, dental, and prescription (unreimbursed only)	72.	<u>50</u>
73. Monthly psychiatric, psychological, or counselor (unreimbursed only)	73.	<u>0</u>
74. Monthly non-prescription medications, cosmetics, toiletries, and sundries	74.	<u>0</u>
75. Monthly grooming	75.	<u>0</u>
76. Monthly gifts	76.	<u>0</u>
77. Monthly pet expenses	77.	<u>0</u>
78. Monthly club dues and membership	78.	<u>0</u>
79. Monthly sports and hobbies	79.	<u>0</u>
80. Monthly entertainment	80.	<u>0</u>
81. Monthly periodicals/books/tapes/CD's	81.	<u>0</u>
82. Monthly vacations	82.	<u>0</u>
83. Monthly religious organizations	83.	<u>0</u>
84. Monthly bank charges/credit card fees	84.	<u>0</u>
85. Monthly education expenses	85.	<u>0</u>
Other: (include any usual and customary expenses not otherwise mentioned in the items listed above)		
86. <u>Other Expenses</u>	86.	<u>0</u>
87. _____	86.	<u>0</u>
88. _____	86.	<u>0</u>
89. _____	86.	<u>0</u>
<b>90.</b>	<b>SUBTOTAL (add lines 70 through 89)</b>	<b>90. \$</b> <u>50</u>

**MONTHLY PAYMENTS TO CREDITORS:** (only when payments are currently made by you on outstanding balances)

NAME OF CREDITOR(s):

91. <u>Bank One MasterCard</u>	91. \$	<u>37</u>
92. <u>Citibank VISA Card</u>	92.	<u>60</u>
93. _____	93.	_____
94. _____	94.	_____
95. _____	95.	_____
96. _____	96.	_____
97. _____	97.	_____
98. _____	98.	_____

99.	_____	99.	_____
100.	_____	100.	_____
101.	_____	101.	_____
102.	_____	102.	_____
103.	_____	103.	_____
<b>104.</b>	<b>SUBTOTAL</b> (add lines 91 through 103)	<b>104. \$</b>	<u>97</u>

<b>105. TOTAL MONTHLY EXPENSES:</b> (add lines 25, 35, 58, 63, 69, 90, and 104 of Section II, Expenses)	<b>105. \$</b>	<u>7,085</u>
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**SUMMARY**

<b>106. TOTAL PRESENT MONTHLY NET INCOME</b> (from line 27 of SECTION I. INCOME)	<b>106. \$</b>	<u>4,133</u>
<b>107. TOTAL MONTHLY EXPENSES (from line 105 above)</b>	<b>107. \$</b>	<u>7,085</u>
<b>108. SURPLUS</b> (If line 106 is more than line 107, subtract line 107 from line 106. This is the amount of your surplus. Enter that amount here.)	<b>108. \$</b>	<u>0</u>
<b>109. (DEFICIT)</b> (If line 107 is more than line 106, subtract line 106 from line 107. This is the amount of your deficit. Enter that amount here.)	<b>109. \$ (</b>	<u>2,952</u> <b>)</b>

**SECTION III. ASSETS AND LIABILITIES**

**A. ASSETS (This is where you list what you OWN.)**

**INSTRUCTIONS:**

**STEP 1:** In column A, list a description of each separate item owned by you (and/or your spouse, if this is a petition for dissolution of marriage). Blank spaces are provided if you need to list more than one of an item.

**STEP 2:** If this is a petition for dissolution of marriage, check the box in Column A next to any item that you are requesting the judge award to you.

**STEP 3:** In column B, write what you believe to be the current fair market value of all items listed.

**STEP 4:** Use column C only if this is a petition for dissolution of marriage and you believe an item is "nonmarital," meaning it belongs to only one of you and should not be divided. You should indicate to whom you believe the item belongs. (Typically, you will only use Column C if property was owned by one spouse before the marriage. See the "General Information for Self-Represented Litigants" found at the beginning of these forms and section 61.075(1), Florida Statutes, for definitions of "marital" and "nonmarital" assets and liabilities.)

A. ASSETS: DESCRIPTION OF ITEM(S) DO NOT LIST ACCOUNT NUMBERS.  √ the box next to any asset(s) which you are requesting the judge award to you.	B. Current Fair Market Value	C. Nonmarital (√ correct column)	
		husband	wife
<input type="checkbox"/> Cash (on hand)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Cash (in banks or credit unions)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Stocks / Bonds First Union	1,875	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Vanguard Index 500	12,755	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Notes		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Money owed to you (not evidenced by a note)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Real estate: (Home)		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> (Other) Vacation Home	100,000	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Lakefront Property Condo	45,000	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Business interests		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Automobiles		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Boats		<input type="checkbox"/>	<input type="checkbox"/>

A. ASSETS: DESCRIPTION OF ITEM(S) DO NOT LIST ACCOUNT NUMBERS.  √ the box next to any asset(s) which you are requesting the judge award to you.	B. Current Fair Market Value	C. Nonmarital (√ correct column)	
		husband	wife
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other vehicles		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Retirement plans Vanguard IRA	12,555	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Furniture & furnishings in home		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Furniture & furnishings elsewhere		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Collectibles		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Jewelry		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Life insurance (cash surrender value)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sporting and entertainment equipment		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other assets		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Paintings	700	<input type="checkbox"/>	<input type="checkbox"/>
<b>Total Assets (add column B)</b>	<b>\$ 172,885</b>		

Florida Family Law Rules of Procedure Form 12.902(c), Family Law Financial Affidavit (09/06)

**B. LIABILITIES/DEBTS (This is where you list what you OWE.)**

**INSTRUCTIONS:**

**STEP 1:** In column A, list a description of each separate debt owed by you (and/or your spouse, if this is a petition for dissolution of marriage). Blank spaces are provided if you need to list more than one of an item.

**STEP 2:** If this is a petition for dissolution of marriage, check the box in Column A next to any debt(s) for which you believe you should be responsible.

**STEP 3:** In column B, write what you believe to be the current amount owed for all items listed.

**STEP 4:** Use column C only if this is a petition for dissolution of marriage and you believe an item is "nonmarital," meaning the debt belongs to only one of you and should not be divided. You should indicate to whom you believe the debt belongs. (Typically, you will only use Column C if the debt was owed by one spouse before the marriage. See the "General Information for Self-Represented Litigants" found at the beginning of these forms and section 61.075(1), Florida Statutes, for definitions of "marital" and "nonmarital" assets and liabilities.)

A. LIABILITIES: DESCRIPTION OF ITEM(S) DO NOT LIST ACCOUNT NUMBERS.  √ the box next to any debts(s) for which you believe you should be responsible.	B. Current Amount Owed	C. Nonmarital (√ correct column)	
		husband	wife
<input type="checkbox"/> First mortgage on home		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Second mortgage on home		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Other mortgages    Vacation Home 1st mortgage	18,750	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Charge/credit card accounts		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Auto loans		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Bank/Credit Union loans		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Money you owe (not evidenced by a note)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Judgments		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Other    Bank One MasterCard	3,456	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Citibank VISA Card	775	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<b>Total Debts (add column B)</b>	<b>\$ 22,981</b>		

**C. NET WORTH (excluding contingent assets and liabilities)**

**Total Assets** (enter total of Column B in Asset Table; Section A) \$ 172,885  
**Total Liabilities** (enter total of Column B in Liabilities Table; Section B) \$ 22,981

**TOTAL NET WORTH (Total Assets minus Total Liabilities)**  
(excluding contingent assets and liabilities) \$ 149,904

**D. CONTINGENT ASSETS AND LIABILITIES:**

INSTRUCTIONS: If you have any **POSSIBLE assets** (income potential, accrued vacation or sick leave, bonus, inheritance, etc.) or **POSSIBLE liabilities** (possible lawsuits, future unpaid taxes, contingent tax liabilities, debts assumed by another), you must list them here.

Contingent Assets  √ the box next to any contingent asset(s) which you are requesting the judge award to you.	Possible Value	Nonmarital (√ correct column)	
		husband	wife
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<b>Total Contingent Assets</b>	\$ 0		

Contingent Liabilities  √ the box next to any contingent debt(s) for which you believe you should be responsible.	Possible Amount Owed	Nonmarital (√ correct column)	
		husband	wife
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<b>Total Contingent Liabilities</b>	\$ 0		

**E. CHILD SUPPORT GUIDELINES WORKSHEET.**  Florida Family Law Rules of Procedure Form 12.902(e), Child Support Guidelines Worksheet, MUST be filed with the court at or prior to a hearing to establish or modify child support. This requirement cannot be waived by the parties.)

[  one only]

**A Child Support Guidelines Worksheet IS or WILL BE filed in this case.**

This case involves the establishment or modification of child support.

**A Child Support Guidelines Worksheet IS NOT being filed in this case.**

The establishment or modification of child support is not an issue in this case.

**I certify that a copy of this document was:** ( ) mailed ( ) faxed and mailed ( ) hand delivered to the person(s) listed below on {date} \_\_\_\_\_

**Other party or his/her attorney:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Fax Number: \_\_\_\_\_

**I understand that I am swearing or affirming under oath to the truthfulness of the claims made in this affidavit and that the punishment for knowingly making a false statement includes fines and/or imprisonment.**

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature of Party

Printed Name: Marianne P Jones

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

STATE OF FLORIDA

COUNTY OF Sarasota

Sworn to or affirmed and signed before me on \_\_\_\_\_ by \_\_\_\_\_.

\_\_\_\_\_  
NOTARY PUBLIC or DEPUTY CLERK

\_\_\_\_\_  
[Print, type, or stamp commissioned name of notary or deputy clerk.]

Personally known

Produced identification

Type of identification produced \_\_\_\_\_

**IF A NONLAWYER HELPED YOU FILL OUT THIS FORM, HE/SHE MUST FILL IN THE BLANKS BELOW:**

[  fill in **all** blanks]

I, {full legal name and trade name of nonlawyer}, Millicent Farber,

a nonlawyer, located at {street} 9720 Delainey Court, {city} Sarasota,

{state} FL, {phone} 941-361-1200, helped{name} \_\_\_\_\_,

who is the [ one only]  petitioner **or**  respondent, fill out this form.

IN THE CIRCUIT COURT OF THE Twelfth JUDICIAL CIRCUIT,  
IN AND FOR Sarasota COUNTY, FLORIDA

Case No.: 07-32323  
Division: II

Harold J Jones  
Petitioner,  
and

Marianne P Jones  
Respondent.

**FAMILY LAW FINANCIAL AFFIDAVIT (SHORT FORM)**  
(Under \$50,000 Individual Gross Annual Income)

I, {full legal name} Marianne P Jones, being sworn, certify that the following information is true:

My Occupation: Marketing consultant Prev. Employer: Marketing Concepts, Inc.  
Business Address: 877 Proctor Rd, Sarasota, FL 34231  
Pay rate: \$ \_\_\_\_\_ ( ) every week ( ) every other week ( ) twice a month ( ) monthly ( ) other \_\_\_\_\_  
 Check here if unemployed and explain on a separate sheet your efforts to find employment.

**SECTION I. PRESENT MONTHLY GROSS INCOME:**

All amounts must be MONTHLY. See the instructions with this form to figure out money amounts for anything that is NOT paid monthly. Attach more paper, if needed. Items included under "other" should be listed separately with separate dollar amounts.

1. Monthly gross salary or wages	1.	\$ <u>4,117</u>
2. Monthly bonuses, commissions, allowances, overtime, tips, and similar payments	2.	<u>0</u>
3. Monthly business income from sources such as self-employment, partnerships, close corporations, and/or independent contracts (gross receipts minus ordinary and necessary expenses required to produce income) ( <input type="checkbox"/> Attach sheet itemizing such income and expenses.)	3.	<u>167</u>
4. Monthly disability benefits/SSI	4.	<u>0</u>
5. Monthly Workers' Compensation	5.	<u>0</u>
6. Monthly Unemployment Compensation	6.	<u>0</u>
7. Monthly pension, retirement, or annuity payments	7.	<u>0</u>
8. Monthly Social Security benefits	8.	<u>0</u>
9. Monthly alimony actually received		
9a. From this case: \$ <u>967</u>		
9b. From other case(s): <u>0</u>	Add 9a and 9b	9. <u>967</u>
10. Monthly interest and dividends	10.	<u>83</u>
11. Monthly rental income (gross receipts minus ordinary and necessary expenses required to produce income) ( <input type="checkbox"/> Attach sheet itemizing such income and expense items.)	11.	<u>333</u>
12. Monthly income from royalties, trusts, or estates	12.	<u>0</u>
13. Monthly reimbursed expenses and in-kind payments to the extent that they reduce personal living expenses	13.	<u>0</u>
14. Monthly gains derived from dealing in property (not including nonrecurring gains)	14.	<u>0</u>
15. Any other income of a recurring nature (list source) _____	15.	<u>0</u>
16. _____	16.	<u>0</u>

**17. PRESENT MONTHLY GROSS INCOME** (Add lines 1 - 16) **TOTAL:** **17. \$ 5,667**

**PRESENT MONTHLY DEDUCTIONS:**

18. Monthly federal, state, and local income tax (corrected for filing status and allowable dependents and income tax liabilities)			
a. Filing Status <u>Head of Household</u>			
b. Number of dependents claimed <u>0</u>		18. \$	<u>378</u>
19. Monthly FICA or self-employment taxes		19.	<u>255</u>
20. Monthly Medicare payments		20.	<u>60</u>
21. Monthly mandatory union dues		21.	<u>20</u>
22. Monthly mandatory retirement payments		22.	<u>0</u>
23. Monthly health insurance payments (including dental insurance), excluding portion paid for any minor children of this relationship		23.	<u>          </u>
24. Monthly court-ordered child support actually paid for children from another relationship		24.	<u>0</u>
25. Monthly court-ordered alimony actually paid			
25a. from this case: \$ <u>0</u>			
25b. from other case(s): <u>0</u>			
	Add 25a and 25b	25.	<u>0</u>
<b>26. TOTAL DEDUCTIONS ALLOWABLE UNDER SECTION 61.30, FLORIDA STATUTES</b> (Add lines 18 through 25)	<b>TOTAL:</b>	<b>26. \$</b>	<u>713</u>

**PRESENT NET MONTHLY INCOME** (Subtract line 26 from line 17) **27. \$** 4,954

**SECTION II. AVERAGE MONTHLY EXPENSES**

**A. HOUSEHOLD:**

Mortgage or rent	\$	<u>4,650</u>
Property taxes	\$	<u>250</u>
Utilities	\$	<u>217</u>
Telephone	\$	<u>70</u>
Food	\$	<u>347</u>
Meals outside home	\$	<u>0</u>
Maintenance/Repairs	\$	<u>100</u>
Other _____	\$	<u>0</u>

**B. AUTOMOBILE**

Gasoline	\$	<u>350</u>
Repairs	\$	<u>0</u>
Insurance	\$	<u>42</u>

**C. CHILD(REN)'S EXPENSES**

Day care	\$	<u>477</u>
Lunch money	\$	<u>0</u>
Clothing	\$	<u>0</u>
Grooming	\$	<u>0</u>
Gifts for holidays	\$	<u>0</u>
Medical/Dental (uninsured)	\$	<u>0</u>
Other	\$	<u>435</u>

**D. INSURANCE**

Medical/Dental	\$	<u>0</u>
Child(ren)'s medical/dental	\$	<u>0</u>
Life	\$	<u>0</u>
Other _____	\$	<u>0</u>

**E. OTHER EXPENSES NOT LISTED ABOVE**

Clothing	\$	<u>0</u>
Medical/Dental (uninsured)	\$	<u>50</u>
Grooming	\$	<u>0</u>
Entertainment	\$	<u>0</u>
Gifts	\$	<u>0</u>
Religious organizations	\$	<u>0</u>
Miscellaneous	\$	<u>0</u>
Other <u>Other expenses</u>	\$	<u>0</u>
_____	\$	<u>0</u>
_____	\$	<u>0</u>
_____	\$	<u>0</u>
_____	\$	<u>0</u>
_____	\$	<u>0</u>
_____	\$	<u>0</u>

**F. PAYMENTS TO CREDITORS**

	MONTHLY
CREDITOR:	PAYMENT
Bank One MasterCard	\$ <u>37</u>
Citibank VISA Card	\$ <u>60</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

**28. TOTAL MONTHLY EXPENSES**

(add ALL monthly amounts in A through F above) **28. \$** 7,085

**SUMMARY**

**29. TOTAL PRESENT MONTHLY NET INCOME**

(from line 27 of SECTION I. INCOME)

**29. \$** 4,954

**30. TOTAL MONTHLY EXPENSES** (from line 28 above)

**30. \$** 7,085

**31. SURPLUS** (If line 29 is more than line 30, subtract line 30 from line 29.

This is the amount of your surplus. Enter that amount here.)

**31. \$** 0

**32. (DEFICIT)** (If line 30 is more than line 29, subtract line 29 from line 30.

This is the amount of your deficit. Enter that amount here.)

**32. (\$** 2,131 **)**

**SECTION III. ASSETS AND LIABILITIES**

Use the nonmarital column only if this is a petition for dissolution of marriage and you believe an item is "nonmarital," meaning it belongs to only one of you and should not be divided. You should indicate to whom you believe the item(s) or debt belongs. (Typically, you will only use this column if property/debt was owned/owed by one spouse before the marriage. See the "General Information for Self-Represented Litigants" found at the beginning of these forms and section 61.075(1), Florida Statutes, for definitions of "marital" and "nonmarital" assets and liabilities.)

**A. ASSETS:**

DESCRIPTION OF ITEM(S). List a description of each separate item owned by you (and/or your spouse, if this is a petition for dissolution of marriage). DO NOT LIST ACCOUNT NUMBERS. ✓ the box next to any asset(s) which you are requesting the judge award to you.	Current Fair Market Value	Nonmarital (✓ correct column)	
		husband	wife
<input type="checkbox"/> Cash (on hand)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Cash (in banks or credit unions)		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Stocks, Bonds, Notes	39,630	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Real estate: (Home) 5800 Camelot Lakes Pky	450,000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> (Other)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Automobiles		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other personal property	2,200	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Retirement plans Manatee Teachers' Union	22,292	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Other Consulting	0	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Check here if additional pages attached.			
<b>Total Assets</b> (add column B)	<b>\$ 514,122</b>		

**B. LIABILITIES:**

DESCRIPTION OF ITEM(S). List a description of each separate debt owed by you (and/or your spouse, if this is a petition for dissolution of marriage). DO NOT LIST ACCOUNT NUMBERS. <input checked="" type="checkbox"/> the box next to any debt(s) for which you believe you should be responsible.	Current Amount Owed	Nonmarital ( <input checked="" type="checkbox"/> correct column)	
		husband	wife
<input checked="" type="checkbox"/> First mortgage on home 5800 Camelot Lakes Pky 1st mortgage	320,000	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Second mortgage on home		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Other mortgages		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Auto loans		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Charge/credit card accounts		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Other Bank One MasterCard	3,456	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Citibank VISA Card	775	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Check here if additional pages are attached.			
<b>Total Debts (add column B)</b>	<b>\$ 324,231</b>		

**C. CONTINGENT ASSETS AND LIABILITIES:**

INSTRUCTIONS: If you have any **POSSIBLE assets** (income potential, accrued vacation or sick leave, bonus, inheritance, etc.) or **POSSIBLE liabilities** (possible lawsuits, future unpaid taxes, contingent tax liabilities, debts assumed by another), you must list them here.

Contingent Assets <input checked="" type="checkbox"/> the box next to any contingent asset(s) which you are requesting the judge award to you.	Possible Value	Nonmarital ( <input checked="" type="checkbox"/> correct column)	
		husband	wife
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<b>Total Contingent Assets</b>	<b>\$ 0</b>		

Contingent Liabilities <input checked="" type="checkbox"/> the box next to any contingent debt(s) for which you believe you should be responsible.	Possible Amount Owed	Nonmarital ( <input checked="" type="checkbox"/> correct column)	
		husband	wife
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
<b>Total Contingent Liabilities</b>	<b>\$ 0</b>		

**SECTION IV. CHILD SUPPORT GUIDELINES WORKSHEET**

( Florida Family Law Rules of Procedure Form 12.902(e), Child Support Guidelines Worksheet, MUST be filed with the court at or prior to a hearing to establish or modify child support. This requirement cannot be waived by the parties.)

[  one only]

**A Child Support Guidelines Worksheet IS or WILL BE filed in this case.** This case involves the establishment or modification of child support.

**A Child Support Guidelines Worksheet IS NOT being filed in this case.** The establishment or modification of child support is not an issue in this case.

I certify that a copy of this document was [  one only] ( ) mailed ( ) faxed and mailed ( ) hand delivered to the person(s) listed below on {date} \_\_\_\_\_

**Other party or his/her attorney:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Fax Number: \_\_\_\_\_

**I understand that I am swearing or affirming under oath to the truthfulness of the claims made in this affidavit and that the punishment for knowingly making a false statement includes fines and/or imprisonment.**

Dated: \_\_\_\_\_

\_\_\_\_\_  
Signature of Party

Printed Name: Marianne P Jones

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

STATE OF FLORIDA

COUNTY OF Sarasota

Sworn to or affirmed and signed before me on \_\_\_\_\_ by \_\_\_\_\_.

\_\_\_\_\_  
NOTARY PUBLIC or DEPUTY CLERK

\_\_\_\_\_  
[Print, type, or stamp commissioned name of notary or deputy clerk.]

\_\_\_ Personally known

\_\_\_ Produced identification

Type of identification produced \_\_\_\_\_

**IF A NONLAWYER HELPED YOU FILL OUT THIS FORM, HE/SHE MUST FILL IN THE BLANKS**

**BELOW:** [  fill in all blanks]

I, {full legal name and trade name of nonlawyer}, Millicent Farber,  
a nonlawyer, located at {street} 9720 Delainey Court, {city} Sarasota,  
{state} FL, {phone} 941-361-1200, helped{name} \_\_\_\_\_,  
who is the [  one only] \_\_\_ petitioner or \_\_\_ respondent, fill out this form.

# Florida Child Support Guidelines Worksheet

## Florida Child Support Guidelines - Noncustodial Time Under 40 Percent

The child support guideline worksheet amount to be paid by Harold is \$1,728 per month. The chart below, taken from the official Florida form, shows how we got that result if noncustodial parent time was under 40 percent.

### CASE INFORMATION

[1] Mother.	<u>Marianne</u>	<u>P</u>	<u>Jones</u>
[2] Father.	<u>Harold</u>	<u>J</u>	<u>Jones</u>
[3] Children: . . . . .	<u>Tiffany</u>	<u>Amber</u>	
	<u></u>	<u></u>	
	<u></u>	<u></u>	
[4] Total number of children in this case. . . . .			<u>2</u>

### MONTHLY INCOME

	Mother	Father	Total
[5] Gross Income . . . . .	<u>5,667</u>	<u>15,625</u>	
[6] Less: Allowable Deductions . . . . .	<u>832</u>	<u>5,789</u>	
[7] Net Income (line 5 - line 6) . . . . .	<u>4,835</u>	<u>9,836</u>	<u>14,671</u>
[8] % Share of Total . . . . .	<u>32.96</u>	<u>67.04</u>	

### MONTHLY FINANCIAL NEED

[9] Basic Need . . . . .		<u>2,578</u>
[10] 75% of Child Care . . . . .		<u>0</u>
[11] Insurance (only for children on line 3) . . . . .		<u>0</u>
[12] Total Financial Need (lines 9+10+11) . . . . .		<u>2,578</u>

### NONCUSTODIAL PARENTAL OBLIGATION

[13] Obligation. Line 8 * Line 12 . . . . .	<u>850</u>	<u>1,728</u>
[14] Credit for child care (*) . . . . .	<u></u>	<u></u>
[15] Credit for child's health insurance (*). . . . .	<u></u>	<u></u>
[16] Net Obligation per month (ln 13-14-15) . . . . .	<u></u>	<u>1,728</u>

(\*) Credits for child care and health insurance apply only if the non-custodial parent pays for those items.

# Division of Marital Property

Property division report for Harold J Jones and Marianne P Jones.

	Harold Amount	Pct	Marianne Amount	Pct	Total Amount	
<b>Real Estate Equity</b>						
5800 Camelot Lakes Pky <sup>(1)</sup>	\$0		\$80,000		\$80,000	1
Total Value	\$450,000					
1st Mortgage	\$320,000					
Equity	\$130,000					
Vacation Home	\$81,250		\$0		\$81,250	2
Total Value	\$100,000					
1st Mortgage	\$18,750					
Equity	\$81,250					
<b>Total Real Estate Equity</b>	<b>\$81,250</b>	<b>50%</b>	<b>\$80,000</b>	<b>50%</b>	<b>\$161,250</b>	
<b>Cash &amp; Investments</b>						
First Union	\$938		\$937		\$1,875	3
Vanguard Index 500	\$6,378		\$6,377		\$12,755	4
Lakefront Property Condo	\$22,500		\$22,500		\$45,000	5
Inheritance	\$0		\$0		\$0	6
<b>Total Investments</b>	<b>\$29,816</b>	<b>50%</b>	<b>\$29,814</b>	<b>50%</b>	<b>\$59,630</b>	
<b>Businesses</b>						
Consulting	\$0		\$0		\$0	7
<b>Total Businesses</b>	<b>\$0</b>	<b>0%</b>	<b>\$0</b>	<b>0%</b>	<b>\$0</b>	
<b>Cars and Personal Effects</b>						
Jewelry	\$1,500		\$0		\$1,500	8
Paintings <sup>(2)</sup>	\$700		\$0		\$700	9
<b>Total Personal Items</b>	<b>\$2,200</b>	<b>100%</b>	<b>\$0</b>	<b>0%</b>	<b>\$2,200</b>	
<b>Subtotal Non-Retirement</b>	<b>\$113,266</b>	<b>51%</b>	<b>\$109,814</b>	<b>49%</b>	<b>\$223,080</b>	
<b>IRAs and 401(k)s</b>						
Vanguard IRA	\$12,555		\$0		\$12,555	10
<b>Total IRAs and 401(k)s</b>	<b>\$12,555</b>	<b>100%</b>	<b>\$0</b>	<b>0%</b>	<b>\$12,555</b>	
<b>Defined Benefit Pensions</b>						
Manatee Teachers' Union	\$0		\$17,300		\$17,300	11
<b>Total Pensions</b>	<b>\$0</b>	<b>0%</b>	<b>\$17,300</b>	<b>100%</b>	<b>\$17,300</b>	
<b>Subtotal Retirement</b>	<b>\$12,555</b>	<b>42%</b>	<b>\$17,300</b>	<b>58%</b>	<b>\$29,855</b>	
<b>Total Assets</b>	<b>\$125,821</b>	<b>50%</b>	<b>\$127,114</b>	<b>50%</b>	<b>\$252,935</b>	

Property division report for Harold J Jones and Marianne P Jones.

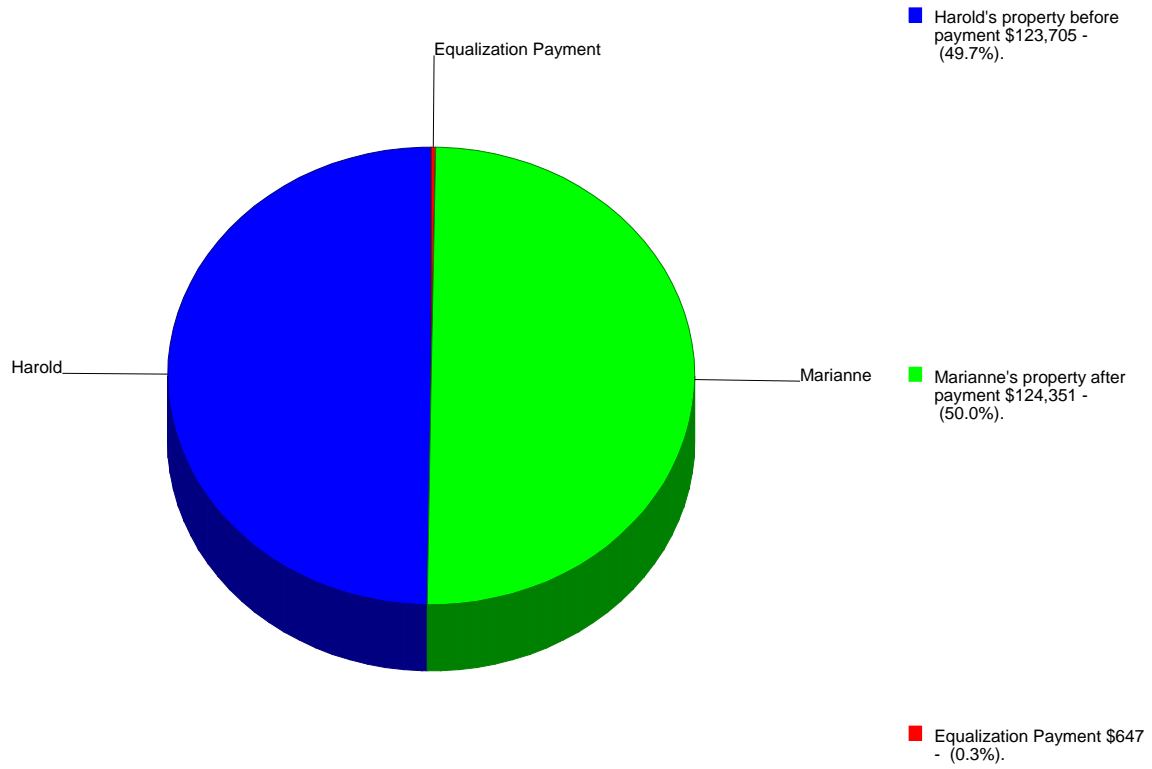
	<b>Harold Amount</b>	<b>Pct</b>	<b>Marianne Amount</b>	<b>Pct</b>	<b>Total Amount</b>
<b>Debts</b>					
Bank One MasterCard	(\$1,728)		(\$1,728)		(\$3,456) 12
Citibank VISA Card	(\$388)		(\$388)		(\$776) 13
Total Debt	(\$2,116)	50%	(\$2,116)	50%	(\$4,232)
<b>Total Debts</b>	<b>(\$2,116)</b>	<b>50%</b>	<b>(\$2,116)</b>	<b>50%</b>	<b>(\$4,232)</b>
<b>Total Assets</b>					
	<b>\$125,821</b>	<b>50%</b>	<b>\$127,114</b>	<b>50%</b>	<b>\$252,935</b>
<b>Total Debts</b>	<b>(\$2,116)</b>	<b>50%</b>	<b>(\$2,116)</b>	<b>50%</b>	<b>(\$4,232)</b>
<b>Total Property</b>	<b>\$123,705</b>	<b>50%</b>	<b>\$124,998</b>	<b>50%</b>	<b>\$248,703</b>
Equalization Payment	\$647		(\$647)		
<b>Total Marital After Payment</b>	<b>\$124,352</b>	<b>50%</b>	<b>\$124,351</b>	<b>50%</b>	

Note: "Total Amount" column may not add due to rounding.

**Footnotes:**

- (1) 5800 Camelot Lakes Pky - Marianne will remain in the marital home.
- (2) Paintings - Paintings have sentimental value to Marianne

## Division of Marital Property:



# Pension Valuation

---

**This valuation is for Marianne P Jones's plan with Manatee Teachers' Union.**

This report values the plan as of the evaluation date, which is: 5/5/2005.

Based on the information entered (see below), the value of the pension as of the evaluation date is: **\$22,292**, using the RP-2000 mortality tables and a gender-specific approach.

As of 5/5/2005, 77.61% of this pension is so-called 'marital property.'

The "marital amount" is typically the amount the judge will divide. (The rest stays with the employee.)

Using a gender-specific approach, the marital amount of the pension plan is \$17,300 (that is, 77.61% of \$22,292).

Using a gender-specific approach, if the judge divides the pension 50/50, for example, then \$8,650.00 (half of \$17,300) would be awarded to each spouse.

These comments about marital property apply in most states, even community property states.

---

## Value of Pension at Retirement:

The value of the pension is \$119,629 (gender-specific approach) as of regular retirement age.

This is typically more than the value as of the evaluation date because, like money in a bank account, a pension's value increases over time.

Knowing the value at earliest retirement age tends to be most useful if the worker is near retirement, or is likely to reach retirement with this company.

If the non-worker spouse is considering taking a share of the payout, as opposed to a cash buyout today, this number helps both spouses see what that payout might be.

---

## This report is based on the following data entered:

### Key Dates:

- 11/20/1973 Employee's birth date.
- 3/7/1995 Date the employee was married.
- 3,694 Number of days from marriage to separation.
- 4/5/1992 Date the employee started in the plan.
- 4/17/2005 Date the employment stopped being 'marital.'  
(This is usually the separation date).
- 5/5/2005 Date to evaluate the plan.  
(This should be the date on the pension benefits administrator's statement).
- 65 Employee's regular retirement age.
- 62 Employee's earliest retirement age.
- NO Is the employee already retired?

### The Plan:

- \$725 Monthly benefit, provided by plan administrator, at "as if" retirement date.
- 1.0% Cost of living adjustment (COLA) percent.
- 4.95% Interest rate (also known as the "discount rate").

---

## Calculation Options Selected:

The pension benefit and marital portion are calculated "as if" the employee works until the cut-off date.

"Cut-off" means the date after which the plan is no longer marital. This is typically the separation date.

The pension's value is calculated assuming the employee retired or will retire on the regular retirement date.

The employee is a female.

# One-Page Summary

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Annual totals for Harold J Jones or Marianne P Jones.

<b>Total Income</b>	Harold	Marianne
Wages and Salary	\$175,000	\$49,400
Child Support Received	0	20,736
Alimony Received	0	11,604
All Other Income	12,500	7,000
<b>TOTAL INCOME</b>	<b>187,500</b>	<b>88,740</b>

<b>Total Expenses</b>		
Child Support Paid	20,736	0
Alimony Paid	11,604	0
All Other Expenses	78,158	84,537
<b>TOTAL EXPENSES</b>	<b>110,498</b>	<b>84,537</b>

<b>Taxes</b>		
Federal Income Tax	40,108	4,813
State Income Tax	0	0
Other Taxes	8,699	3,779
<b>TOTAL TAXES</b>	<b>48,807</b>	<b>8,592</b>

<b>After-Tax Cash</b>		
<b>AFTER-TAX CASH</b>	<b>28,195</b>	<b>-4,389</b>

<b>Property</b>		
Marital Property	123,705	124,998
Separate Property	0	79,992
<b>TOTAL PROPERTY</b>	<b>\$123,705</b>	<b>\$204,990</b>

<b>Miscellaneous</b>		
Number of Dependents	2	0
Filing Status	Single	Head Hsd
Alimony paid, % of gross income	6	0
Child Support paid, % of gross income	11	0
Combined pmts, % of gross income	17	0

# Summary Totals Spreadsheet

## Harold Summary Totals Spreadsheet

Year	Age	INCOME				ASSETS					
		Total Income	Total Expenses	Total Taxes	After Tax Cash	Accum. Savings	Fin Assets	Equity in Real Est.	IRA / 401(k)	Other Assets	Net Worth
2007	37	187,500	110,498	48,807	<b>28,195</b>	28,195	7,826	85,758	13,183	23,843	<b>158,805</b>
2008	38	192,721	122,531	50,456	<b>19,734</b>	47,929	8,377	89,930	13,842	24,210	<b>184,288</b>
2009	39	197,797	125,507	52,146	<b>20,144</b>	68,073	8,972	94,257	14,534	24,623	<b>210,459</b>
2010	40	202,997	116,612	57,861	<b>28,524</b>	96,597	9,615	98,745	15,261	24,700	<b>244,918</b>
2011	41	208,564	119,742	62,361	<b>26,461</b>	123,058	10,309	103,402	16,024	24,700	<b>277,493</b>

## Marianne Summary Totals Spreadsheet

Year	Age	INCOME				ASSETS					
		Total Income	Total Expenses	Total Taxes	After Tax Cash	Accum. Savings	Fin Assets	Equity in Real Est.	IRA / 401(k)	Other Assets	Net Worth
2007	34	88,740	84,537	8,592	<b>(4,389)</b>	0	28,776	196,564	0	43,935	<b>269,275</b>
2008	35	90,090	88,054	9,353	<b>(7,317)</b>	0	21,809	235,467	0	47,204	<b>304,480</b>
2009	36	91,382	89,316	10,117	<b>(8,051)</b>	0	13,828	276,709	0	50,520	<b>341,057</b>
2010	37	81,027	90,246	8,509	<b>(17,728)</b>	(4,482)	0	320,452	0	53,498	<b>369,468</b>
2011	38	82,196	91,875	10,564	<b>(20,243)</b>	(24,725)	0	366,865	0	56,400	<b>398,540</b>

# Budget Report for 2007

## Budget Report for Harold J Jones and Marianne P Jones for 2007

This report shows Harold's and Marianne's income, taxes, expenses, alimony and child support.

	<b>Harold Monthly</b>	<b>Marianne Monthly</b>
<b>Income</b>		
Wages	\$14,583.33	\$4,116.67
Bonuses	666.67	0.00
<b>Total Wage and Non-Wage Income</b>	<b>\$15,250.00</b>	<b>\$4,116.67</b>
<b>Investment Income</b>		
Vanguard Index 500	\$41.67	\$41.67
Lakefront Property Condo	333.33	333.33
Inheritance	0.00	41.67
<b>Total Investment Income</b>	<b>\$375.00</b>	<b>\$416.67</b>
<b>Business Income</b>		
Consulting	\$0.00	\$166.67
<b>Total Business Income</b>	<b>\$0.00</b>	<b>\$166.67</b>
<b>Support Received</b>		
Child Support Received	\$0.00	\$1,728.00
Alimony Received	\$0.00	\$967.00
<b>Total Support Received</b>	<b>\$0.00</b>	<b>\$2,695.00</b>
<b>TOTAL INCOME</b>	<b>\$15,625.00</b>	<b>\$7,395.00</b>

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<b>Mortgage Payments</b>		
5800 Camelot Lakes Pky <sup>(1)</sup>	\$0.00	\$3,750.00
Vacation Home	200.00	0.00
<b>Total Mortgage Payments</b>	<b>\$200.00</b>	<b>\$3,750.00</b>

<b>Living Expenses</b>		
Union Dues	\$0.00	\$20.00
Cable TV	40.00	50.00
Cell phone	50.00	70.00
Homeowners' Insurance	66.67	0.00
Household maintenance / repair	100.00	0.00
Laundry	3.00	0.00
Lawn service	216.67	100.00
Maid / cleaning service	325.00	0.00
Rent	0.00	900.00
Snow removal	108.33	0.00
Tax - Property Tax	416.67	250.00
Utilities - Electricity	75.00	100.00
Utilities - Oil Heat	100.00	66.67
Utilities - Phone	50.00	0.00
Utilities - Water/Sewer	41.67	0.00

	<b>Harold Monthly</b>	<b>Marianne Monthly</b>
Car Payments	500.00	350.00
Car Insurance	83.33	41.67
Car Gasoline/oil	130.00	0.00
Car Maintenance and repair	75.00	0.00
Parking	43.33	0.00
Public/alt. Transportation	43.33	0.00
Child Care - Day Care	0.00	476.67
Bank fees	4.17	0.00
Clothes	66.67	0.00
Charitable	83.33	0.00
Church / synagogue / mosque etc	83.33	0.00
Dues / Clubs	83.33	0.00
Entertainment	86.67	0.00
Food / Groceries	216.67	346.67
Gifts	41.67	0.00
Hair	8.67	0.00
Internet Access	20.00	0.00
Legal and Accounting	200.00	0.00
Previous Relship Child Support	200.00	0.00
Restaurants	130.00	0.00
Toiletries/Grooming/Drug Store	86.67	0.00
Vacations	166.67	0.00
Health Insurance	500.00	0.00
Medical/Doctor Exp	0.00	50.00
Drug & Prescription Exp	87.00	0.00
<b>Total Living Expenses</b>	<b>\$4,532.83</b>	<b>\$2,821.67</b>
<b>Major Expenses</b>		
Tiffany's prep school	\$1,344.92	\$336.25
Amber's prep school	397.83	99.42
<b>Total Major Expenses</b>	<b>\$1,742.75</b>	<b>\$435.67</b>
<b>Payments on Debt</b>		
Bank One MasterCard	\$37.58	\$37.42
<b>Total Payments on Debt</b>	<b>\$37.58</b>	<b>\$37.42</b>
<b>Support Paid</b>		
Child Support Paid	\$1,728.00	\$0.00
Alimony Paid	967.00	0.00
<b>Total Support Paid</b>	<b>\$2,695.00</b>	<b>\$0.00</b>
<b>TOTAL EXPENSES</b>	<b>\$9,208.17</b>	<b>\$7,044.75</b>

	<b>Harold Monthly</b>	<b>Marianne Monthly</b>
<b>Taxes</b>		
Federal Taxes	\$3,342.33	\$401.08
FICA & Medicare	\$724.92	\$314.92
State Taxes	\$0.00	\$0.00
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<b>TOTAL TAXES</b>	<b>\$4,067.25</b>	<b>\$716.00</b>
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Total Income	\$15,625.00	\$7,395.00
Minus Total Expenses	(9,208.17)	(7,044.75)
Minus Total Taxes	(4,067.25)	(716.00)
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<b>AFTER-TAX CASH</b>	<b>\$2,349.58</b>	<b>\$(365.75)</b>
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**Footnotes:**

(1) 5800 Camelot Lakes Pky - Marianne will remain in the marital home.

# "What-If" Analysis

## "What-If" Analysis report for Harold J Jones and Marianne P Jones.

Alimony is being paid by Harold, starting 1/2005.  
 Child Support is being paid by Harold, starting 1/2005.

	No alimony		Marianne break-even		Tax optimized	
	Payment (\$)	Through (yr)	Payment (\$)	Through (yr)	Payment (\$)	Through (yr)
Monthly Alimony:	<u>0</u>	<u>2009</u>	<u>1,450</u>	<u>2009</u>	<u>3,900</u>	<u>2009</u>
Monthly Child Support:	<u>1,728</u>	<u>2023</u>	<u>1,728</u>	<u>2023</u>		
Who claims exemption:						
<i>Tiffany</i>	<u>Harold</u>		<u>Harold</u>		<u>Harold</u>	
<i>Amber</i>	<u>Harold</u>		<u>Harold</u>		<u>Harold</u>	
Harold's Filing Status:						
<i>Current Year</i>	<u>Married filing separ</u>		<u>Married filing separ</u>		<u>Married filing separ</u>	
<i>Future Years</i>	<u>Single</u>		<u>Single</u>		<u>Single</u>	
Marianne's Filing Status:						
<i>Current Year</i>	<u>Head of household</u>		<u>Head of household</u>		<u>Head of household</u>	
<i>Future Years</i>	<u>Head of household</u>		<u>Head of household</u>		<u>Head of household</u>	

### Results (Current Year, Annual):

	Harold	Marianne	Harold	Marianne	Harold	Marianne
<b>Income</b>						
1. Alimony Rec'd. . . . .	0	0	0	17,400	0	46,800
2. Child Support Rec'd. . . . .	0	20,736	0	20,736	0	0
3. All Other Income. . . . .	187,500	56,400	187,500	56,400	187,500	56,400
4. Total Income. . . . .	187,500	77,136	187,500	94,536	187,500	103,200
<b>Expenses</b>						
5. Alimony Paid. . . . .	0	0	17,400	0	46,800	0
6. Child Support Paid. . . . .	20,736	0	20,736	0	0	0
7. All Other Expenses. . . . .	78,158	84,537	78,158	84,537	78,158	84,537
8. Total Expenses. . . . .	98,894	84,537	116,294	84,537	124,958	84,537
<b>Taxes</b>						
9. Federal Tax. . . . .	51,274	3,065	45,184	6,208	34,894	13,558
10. State Tax. . . . .	0	0	0	0	0	0
11. FICA/Medicare Tax. . . . .	8,699	3,779	8,699	3,779	8,699	3,779
12. Total Taxes. . . . .	59,973	6,844	53,883	9,987	43,593	17,337
<b>After-Tax Cash</b>						
13. After-Tax Cash <i>(In 4-8-12).</i> . . . . .	28,633	-14,245	17,323	12	18,949	1,326

# Alimony Present Value ("Buyout")

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This report shows the present value of Alimony for Harold J Jones and Marianne P Jones.

The present value of Alimony is . . . . . \$ 23,725 to Harold.  
 The present value of Alimony is . . . . . \$ 27,735 to Marianne.

## Explanation:

The calculation is based on the following assumptions

1. Pre-tax interest rates (rates of return) on investment.

5.00 Pre-tax rate of return for Harold.  
5.00 Pre-tax rate of return for Marianne.

2. Marginal tax rates.

Marginal federal 28.00 and state 0.00 tax rates for Harold.  
 Marginal federal 15.00 and state 0.00 tax rates for Marianne.

## The buyout amount is calculated as follows:

1. Calculate Monthly Discount Rate = Rate of Return on Investment \* (1 - (Federal Tax Rate + State Tax Rate)) / 12.

0.30 % Monthly Discount Rate (%) for Harold.  
0.35 % Monthly Discount Rate (%) for Marianne.

2. Calculate Monthly Discount Factor = 1/(1 + (Monthly Discount Rate (%) \* 0.01)).

0.9970 Discount Factor for Harold.  
0.9965 Discount Factor for Marianne.

3. Reduce for tax deduction or tax payable, and apply discount factors.

After-tax value of monthly payment = Monthly Payment \* (1-(Fed tax rate + State Tax Rate)).

Present Value of 1st month payment = After-Tax Value \* Monthly Discount Factor.

Present Value of 2nd month payment = After-Tax Value \* Monthly Discount Factor squared.

Present Value of 3rd month payment = After-Tax Value \* Monthly Discount Factor cubed.

And so on, for each monthly payment.

Present value of each year's payments is the sum of the present values of the monthly payments.

Total present value is the sum of the present values of each year's payments.

	Harold			Marianne	
Year	Annual Payment	After-tax Value	Present Value	After-tax Value	Present Value
2007	<u>11,604</u>	<u>8,355</u>	<u>8,194</u>	<u>9,863</u>	<u>9,640</u>
2008	<u>11,604</u>	<u>8,355</u>	<u>7,905</u>	<u>9,863</u>	<u>9,240</u>
2009	<u>11,604</u>	<u>8,355</u>	<u>7,626</u>	<u>9,863</u>	<u>8,856</u>
TOTAL:			<u>23,725</u>		<u>27,735</u>

# Tax Calculation

Taxes for Harold J Jones in 2007 are \$48,807, and taxes for Marianne P Jones are \$8,592.

Harold	Marianne	
Single	Head Hsld	Filing Status in 2007
3	1	Number of exemptions

## Income:

175,000	49,400	Wages and salary.
0	0	Taxable interest income.
500	1,000	Taxable dividend income.
0	11,604	Alimony income.
0	2,000	Business and farm income.
0	0	Capital gain taxable.
0	0	Other gains and losses.
0	0	Taxable IRA and pension income.
4,000	4,000	Rent, royalty, partnership, S corporation.
0	0	Social Security taxable.
8,000	0	Other income.
187,500	68,004	Taxable gross income.

## Adjustments:

0	0	IRA deduction.
0	0	Moving expenses.
0	142	Deduction of 1/2 of self-employment tax.
0	0	Part of health insurance for self-employed people.
11,604	0	Alimony paid.
0	0	Interest on education loans.
0	0	Other deductions.
11,604	142	Total adjustments.
175,896	67,862	Adjusted Gross Income ("AGI") = gross income - total adjustments).

## Itemized Deductions:

0	0	Deductible medical expenditures.
0	0	State income taxes.
0	0	Local income taxes.
5,000	3,000	Property taxes.
816	19,262	Mortgage interest.
2,000	0	Charitable contributions.
50	240	Miscellaneous, subject to 2% AGI threshold.
0	0	miscellaneous, after 2% AGI threshold.
0	0	Miscellaneous, not subject to 2% AGI threshold.
7,816	22,262	Itemized deductions before phase-out.
7,426	22,262	Itemized deductions after phase-out.
5,350	7,850	Compare: standard deduction.

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**Harold****Marianne**

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**Exemptions:**

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10,200	3,400	Deduction for exemptions before phase-out.
9,112	3,400	Deduction for exemptions after phase-out.

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**Tax Before Credits and Other Taxes:**

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159,358	42,200	Taxable Income = AGI - greater of itemized or standard deductions - exemptions.
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38,666	5,674	Tax before credits and other taxes (from tax table or formula).
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**Non-refundable Credits:**

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0	1,144	Child care credit.
0	0	Hope education credit.
0	0	Lifetime learning credit.
0	0	Child credit, after phase-out, non-refundable portion.

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0	1,144	Total non-refundable credits (reduce tax, but not below zero).
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**Refundable Credits:**

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0	0	Child credit, after phase-out, refundable portion.
0	0	Earned income credit.

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0	0	Total refundable credits (can reduce tax below zero and generate a payment from the IRS).
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**Other Taxes on Form 1040:**

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0	0	Tax on retirement plan premature distribution.
1,442	0	Alternative minimum tax.
0	0	Lump-sum distribution 5- or 10- year averaging.
0	283	Self-employment tax.

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**Total Federal Income Tax:**

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= tax before credits and other taxes  
- total nonrefundable credits (down to zero)  
- total refundable credits  
+ other taxes on Form 1040

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40,108	4,813	Total Federal Income Tax.
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**Taxes Not on Form 1040:**

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6,045	3,063	FICA Taxes.
2,654	716	Medicare Taxes.
0	0	State Income Tax

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**Total Taxes:**

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<b>48,807</b>	<b>8,592</b>	<b>Total taxes.</b>
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