

FINANCIAL STATEMENT OF

*Husband/*Wife/*Civil partner

(*delete as appropriate)

In the

*[High/County Court]
*[Principal Registry of the Family Division]

Case No.

Always quote this

Petitioner's Solicitor's
reference

Respondent's Solicitor's
reference

Between

and

Who is the *husband/*wife/*civil partner
*Petitioner/*Respondent in the
*divorce/*dissolution suit

Applicant in this matter

Who is the *husband/*wife/*civil partner
*Petitioner/*Respondent in the
*divorce/*dissolution suit

Respondent in this matter

Please fill in this form fully and accurately. Where any box is not applicable, write 'N/A'.

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

A failure to give full and accurate disclosure may result in any order the court makes being set aside.

If you are found to have been deliberately untruthful, criminal proceedings for perjury may be taken against you.

You must attach documents to the form where they are specifically sought and you may attach other documents where it is necessary to explain or clarify any of the information that you give.

Essential documents that must accompany this statement are detailed in the form.

If there is not enough room on the form for any particular piece of information, you may continue on an attached sheet of paper.

If you are in doubt about how to complete any part of this form you should seek legal advice.

This Statement must be sworn before a solicitor, a commissioner for oaths or an Officer of the Court or, if abroad, a notary or duly authorised official, before it is filed with the Court or sent to the other party (see last page).

This statement is filed by

Name and address of solicitor

1 General Information

1.1 Full name

1.2 Date of birth	Date	Month	Year	1.3 Date of the marriage/ civil partnership	Date	Month	Year
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1.4 Occupation

1.5 Date of the separation	Date	Month	Year	Tick here if not applicable <input type="checkbox"/>
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1.6 Date of the	Petition			Decree nisi/Decree of judicial separation Conditional order/ Separation order			Decree absolute/ Final order (if applicable)		
	Date	Month	Year	Date	Month	Year	Date	Month	Year

1.7 If you have subsequently married or formed a civil partnership, or will do so, state the date	Date	Month	Year	1.8 Are you co-habiting?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
				1.9 Do you intend to co-habit within the next six months?	Yes <input type="checkbox"/>	No <input type="checkbox"/>

1.10 Details of any children of the family	Full names			Date of birth			With whom does the child live?
	Date	Month	Year				

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

1.12 Details of the present and proposed future educational arrangements for the children.

Present arrangements	Future arrangements

1.13 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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1.14 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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1.15 Details of any other court cases between you and your spouse/civil partner, whether in relation to money, property, children or anything else.

Case No	Court

1.16 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 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) if it remains unsold.

Documentation required for attachment to this section:

- a) A copy of any valuation of the property obtained within the last six months. If you cannot provide this document, please give your own realistic estimate of the current market value
- b) A recent mortgage statement confirming the sum outstanding on **each** mortgage

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 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

Balance outstanding on any mortgage(s)

If a sale at this stage would result in penalties payable under the mortgage, state 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)

TOTAL value of your interest in the family home:

Total A

£

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.

Documentation required for attachment to this section:

For each account listed, all statements covering the last 12 months.

Name of bank or building society, including branch name	Type of account (e.g. 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.)

Documentation required for attachment to this section:

Latest statement or dividend counterfoil relating to each investment.

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 holdings: (C2)					£

2.7 Details of all cash sums held in excess of £500. 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 cash sums: (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 owed on credit cards and store cards
- Bank loans
- Hire purchase agreements

List all credit and store cards held including those with a nil or positive balance. Where the liability is not solely your own, give the name(s) of the other account holder(s) and the amount of your share of the liability.

Liability	Name(s) of other account holder(s) <i>(if applicable)</i>	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.

Documentation required for attachment to this section:

- a) Copies of the business accounts for the last two financial years
- b) Any documentation, if available at this stage, upon which you have based your estimate of the current value of your interest in this business, for example a letter from an accountant or a formal valuation. It is not essential to obtain a formal valuation at this stage

Name of the business

Briefly describe the nature of the business

Are you

(Please delete all those that are not applicable)

- a) Sole trader
- b) Partner in a partnership with others
- c) 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 an accurate reflection of the current position, state why.

For example, if there has been a material change since the last accounts, or if the valuations of the assets are not a true reflection of their value (e.g. because property or other assets have not been re-valued in recent years or because they are shown at a book value)

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. Identify where these appear in the business accounts

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 Capital Gains Tax 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).

2 Financial Details *Part 4 Capital: Pensions*

2.13 Give details of all your pension rights. Complete a separate page for each pension.

EXCLUDE:

- Basic State Pension

INCLUDE (complete a separate page for each one):

- 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 schemes

Documentation required for attachment to this section:

- A recent statement showing the cash equivalent transfer value (CETV) provided by the trustees or managers of each pension arrangement (or, in the case of the additional state pension, a valuation of these rights)
- If any valuation is not available, give the estimated date when it will be available and attach a copy of your letter to the pension company or administrators from whom the information was sought and/or state the date on which an application for a valuation of a State Earnings Related Pension Scheme was submitted to the Department of Work and Pensions

Name and address of pension arrangement

Your National Insurance Number

Number of pension arrangement or reference number

Type of scheme
e.g. occupational or personal, final salary, money purchase, additional state pension or other (if other, please give details)

Date the CETV was calculated

Is the pension in payment or drawdown or deferment? (Please answer Yes or No)

State the cash equivalent transfer value (CETV) quotation, or in the additional state pension, the valuation of those rights

If the arrangement is an occupational pension arrangement that is paying reduced CETVs, please quote what the CETV would have been if not reduced. If this is not possible, please indicate if the CETV quoted is a reduced CETV

TOTAL value of ALL your pension assets: TOTAL F

£

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 benefit 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 from which income has been received during the last 12 months (even if it has now ceased)
- Any source 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 other 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 property	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 assets	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 for 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. State your current income needs and, if these are likely to change in the near future, explain the anticipated change and give an estimate of the future cost.

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

3.1.1 Income needs for yourself.

INCLUDE:

- All income needs for yourself
- Income needs for any children living with you or provided for by you only if these form part of your total income needs (e.g. housing, fuel, car expenses, holidays, etc)

Item	Current cost	Estimated future cost
SUB-TOTAL your income needs:		£

3.1.2 Income needs for children living with you or provided for by you.

INCLUDE:

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

Item	Current cost	Estimated future cost
SUB-TOTAL children's income needs:		£
TOTAL of ALL income needs:		£

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:

- All capital needs for yourself
- 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, car, 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** 12 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 during the marriage/civil partnership.

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 contribution 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 (the following list is not exhaustive):

- **Earning capacity**
- **Disability**
- **Inheritance prospects**
- **Redundancy**
- **Retirement**
- **Any plans to marry, form a civil partnership or cohabit**
- **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.

Annual Income		Assets and Liabilities	
Nature of income	Value (if known, state whether gross or net)	Item	Value (if known)
Total income:	£	Total assets/liabilities:	£

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 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.)**
- c) **Whether you are seeking a pension sharing or pension attachment order**
- 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.

Sworn confirmation of the information

I *(the above-named Applicant/Respondent)*

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

Sworn by the above named

at)
)
)
)
this day of 20)

Before me,

A solicitor, commissioner for oaths,
an Officer of the Court appointed by the
Judge to take affidavits, a notary or duly
authorised official.

Address all communications to the Court Manager of the Court and quote the case number.
If you do not quote this number, your correspondence may be returned.

SCHEDULE OF DOCUMENTS TO ACCOMPANY FORM E

The following list shows the documents you must attach to your Form E if applicable. You may attach other documents where it is necessary to explain or clarify any of the information that you give in the Form E.

Form E paragraph	Document	Please tick		
		Attached	Not applicable	To follow
1.14	Application to vary an order: if applicable, attach a copy of the relevant order.			
2.1	Matrimonial home valuation: a copy of any valuation relating to the matrimonial home that has been obtained in the last six months.			
2.1	Matrimonial home mortgage(s): a recent mortgage statement in respect of each mortgage on the matrimonial home confirming the amount outstanding.			
2.2	Any other property: a copy of any valuation relating to each other property disclosed that has been obtained in the last six months.			
2.2	Any other property: a recent mortgage statement in respect of each mortgage on each other property disclosed confirming the amount outstanding.			
2.3	Personal bank, building society and National Savings accounts: copies of statements for the last 12 months for each account that has been held in the last twelve months, either in your own name or in which you have or have had any interest.			
2.4	Other investments: the latest statement or dividend counterfoil relating to each investment as disclosed in paragraph 2.4.			
2.5	Life insurance (including endowment) policies: a surrender valuation for each policy that has a surrender value as disclosed under paragraph 2.5.			
2.11	Business interests: a copy of the business accounts for the last two financial years for each business interest disclosed.			
2.11	Business interests: any documentation that is available to confirm the estimate of the current value of the business, for example, a letter from an accountant or formal valuation if that has been obtained.			
2.13	Pension rights: a recent statement showing the cash equivalent transfer value (CETV) provided by the trustees or managers of each pension arrangement that you have disclosed (or, in the case of the additional state pension, a valuation of these rights). If not yet available, attach a copy of the letter sent to the pension company or administrators requesting the information.			
2.15	Employment income: your P60 for the last financial year in respect of each employment that you have.			
2.15	Employment income: your last three payslips in respect of each employment that you have.			
2.15	Employment income: your last form P11D if you have been issued with one.			
2.16	Self-employment or partnership income: a copy of your last tax assessment or if that is not available, a letter from your accountant confirming your tax liability.			
2.16	Self-employment or partnership income: if net income from the last financial year and the estimated income for the next twelve months is significantly different, a copy of the management accounts for the period since your last accounts.			
State relevant Form E paragraph	Description of other documents attached:			

Case no.

*Delete as
appropriate

In the

***[High/County Court]
*[Principal Registry of the Family Division]**

In the marriage/Civil Partnership between

who is the husband/wife/civil partner

and

who is the husband/wife/civil partner

Financial Statement on behalf of

who is the husband/wife/civil partner
and the Petitioner/Respondent in the
divorce/dissolution suit

This statement is filed by

who are solicitors for the husband/wife/civil partner