

**HARRIS-PEARSON & PEARSON
FAMILY MEDIATION**

5775 Wayzata Boulevard, Suite 515
Minneapolis, Minnesota 55416
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**MEDIATION
FINANCIAL DISCLOSURE STATEMENT**

Name: _____

Date: _____

The financial information on the following pages is important. If you need help in completing any item, please ask.

ASSETS

Enter the fair market value of each of the following items as accurately as you can. Also identify the property as precisely as possible, including account numbers, names of banks, etc.

A. Real Estate: (home and other)

Address	Owned by	Fair Market Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. Checking and Savings Accounts:

Location of Accounts	Name on Account	Value	As of
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

C. Non Retirement: (Stocks, Stock Options, Warrants, Bonds, Mutual Funds)

Description	Owned by	Value	As of
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

D. Retirement Accounts: (401(k), Pension Plans, Keoghs, IRAs or Profit Sharing Plans, SEP)

Name of Account	Owned by	Value	As of
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

E. Life Insurance:

Company	Face Value	Insured
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

F. Business or Professional Interests:

Name of Business	Owned by	Percent of Ownership
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

G. Notes: (i.e., money owed to you or your spouse)

Owed by	Amount	Due Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

H. Safe Deposit Box: (please list contents, location, and owner)

I. Personal Property (Valued at \$500 or more)

Description of Property	Owned by	Value	As of
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

J. Miscellaneous Assets: (Patents, Trademarks, Copyrights, Royalties)

Description	Owned by
_____	_____
_____	_____
_____	_____
_____	_____

LIABILITIES

A. Mortgages:

	Institution	Balance	As of
1 st mtg.	_____	_____	_____
2 nd mtg.	_____	_____	_____
Line of credit	_____	_____	_____
Annual property taxes	_____		
Annual mortgage(s) interest	_____		

B. Loans Payable (by you or your spouse)

To whom	Due Date	Balance	As of
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

C. Loans on Insurance Policies

Name of Policy	Balance	As of
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

D. Other Debts

	Name on Account	Balance	As of
VISA	_____	_____	_____
MasterCard	_____	_____	_____
Discover	_____	_____	_____
American Express	_____	_____	_____
Student Loans	_____	_____	_____
Other:	_____	_____	_____

E. Taxes (list type and years)

Federal	Year(s)
_____	_____
State	
_____	_____

NON-MARITAL ASSETS

Please list and describe inherited property, property acquired and owned prior to marriage

Description of Asset	Owned by
_____	_____
_____	_____
_____	_____
_____	_____

INCOME

	Husband	Wife
Name	_____	_____
Employer	_____	_____
Position	_____	_____
Gross Annual Income	_____	_____
Pension Deduction (percentage or amount /month)	_____	_____
Cost of Medical/Dental/Vision Insurance (monthly)	_____	_____
Other Income:	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Please bring two (2) copies of the following documents to mediation as applicable:

- Real Estate appraisals
- Statements for Current Mortgage/ Line of Credit/Contract for Deed Balance(s)
- Current Bank Statement(s)
- Retirement Account Statement(s)
- Front page of Each Life Insurance Policy
- Latest W-2(s)
- Current Paystub(s)
- Current Credit Card statement(s)