

Financial Information (Other party)

Properties owned throughout the marriage

Address	_____
Who owns it	_____
When purchased	_____
Purchase cost	_____
Value now (if still own it)	_____
Mortgage outstanding	_____
Type of mortgage	_____
Mortgage company	_____
Who pays the mortgage	_____
Who lives in it	_____
Sell it or keep it	_____

Policies

Type of policy	_____
Insurance Company	_____
Policy number	_____
Who is insured	_____
Current value	_____
Maturity value	_____
Date of Maturity	_____

Savings

Shares	_____
Premium Bonds	_____
Investment Bonds	_____
National Savings Certificates	_____

McKeag and Co.

Unit Trusts _____
Investment Trusts _____
ISA's _____
PEP's _____
TESSA's _____
Sharesave schemes _____

Pensions

Name of Scheme/Policy _____
Number _____
Type _____
Retirement Date _____
Current Value of fund _____
Value of lump sum payable on death before retirement _____
Value of lump sum payable on death after retirement _____
Value of lump sum payable upon leaving scheme before retirement _____
Value of lump sum payable upon retirement _____
Monthly pension payable _____
Widow's /Dependant's pension _____

Business Interests

Name of business _____
Address of business _____
Type of business – Company or sole trader etc _____
Type of business carried out _____
Value of business _____
Any CGT payable if business sold _____

Bank Accounts

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Name of bank and branch _____
Type of account _____
Account holders names _____
Current balance _____

Income

Earned Income from work _____
Gross _____
Net _____
Other benefits _____
Self employed income _____
Annual net profit _____
Share to you % _____
Tax paid _____
Benefit Income _____
Type of benefit _____
Amount of benefit _____
Investment income _____
Dividends from shares _____
Interest on bank accounts _____

Liabilities

Credit cards _____
Store Cards _____
Bank Loans _____
Other Loans _____
Hire Purchase Agreements _____
Family 'loans' _____