

STATE OF VERMONT

SUPERIOR COURT  
\_\_\_\_\_ Unit

FAMILY DIVISION  
Docket No. \_\_\_\_\_

Plaintiff

Defendant

Name	DOB	v.	Name	DOB
	/ /			/ /

**FORM 813 B - FINANCIAL AFFIDAVIT: Property and Assets**

I am: (Please check appropriate box)

- Plaintiff
- Defendant
- Other \_\_\_\_\_

My Name and Address:

Name
Street
Town/City                      State                      Zip

**INSTRUCTIONS:** You are **required** to complete and file the 813B if-

1. You are a party in a newly filed divorce, civil union dissolution, legal separation or annulment and you and the other party have minor children; OR
2. You are ordered by the Court to complete and file this form or the other party requests that you fill out the form as part of the discovery process.

**DEADLINE FOR FILING:** This form must be filed with the court before or at your first case manager's conference. If no conference is scheduled it must be filed at least five days before your first scheduled court hearing.

**YOU MUST SEND A COPY OF YOUR COMPLETED FORM TO THE OTHER PARTY AT THE SAME TIME THAT YOU FILE IT WITH THE COURT.**

When you have completed the form and filled in all the required information, you must sign the Affirmation section below and have your signature notarized.

**AFFIRMATION**

**I have read and filled in all the information requested.**

**I hereby affirm of my own knowledge that the facts and financial information I have stated are true and correct as of the date of this Affirmation and that I am not omitting any source or amount of income or other information requested on this form. I understand that any false information may constitute perjury by me. I also understand that if I fail to provide the required information or give misinformation, the judge may order sanctions against me.**

\_\_\_\_\_  
Signature of person making affidavit

Sworn to me on \_\_\_\_\_, 20 \_\_\_\_

\_\_\_\_\_  
Notary Public                      My Commission Expires: \_\_ / \_\_ / 20 \_\_\_\_

## SUMMARY OF ASSETS

Please check each box that applies to you or the other party

REAL ESTATE: (primary residence, camps, land, timeshares, etc.)

I have an interest in (own) real estate either individually or jointly with another.  Yes  No

The other party has/may have an interest in (own) real estate either individually or jointly with another.  Yes  No

PERSONAL PROPERTY: (furniture, antiques, jewelry, electronics, etc.)

I own personal property  Yes  No

The other party owns/may own personal property  Yes  No

VEHICLES: (cars, trucks, ATV's, boats, motorcycles, campers, etc.)

I own vehicles either individually or jointly.  Yes  No

The other party owns/may own vehicles either individually or jointly.  Yes  No

BANK ACCOUNTS:

I have bank accounts either individually or jointly.  Yes  No

The other party has/may have bank accounts either individually or jointly.  Yes  No

INVESTMENTS: (stocks, bonds, mutual funds, trusts, annuities)

I own investments either individually or jointly.  Yes  No

The other party owns/may own investments either individually or jointly.  Yes  No

RETIREMENT ACCOUNTS (IRA, 401 K, pensions, deferred compensation, etc.)

I own retirement accounts.  Yes  No

The other party owns/may own retirement accounts.  Yes  No

LIFE INSURANCE POLICIES:

I have life insurance.  Yes  No

The other party has/may have life insurance.  Yes  No

BUSINESSES:

I own or have an ownership interest in a business.  Yes  No

The other party owns/may own an interest in a business.  Yes  No

## TRANSFER/SALE OF ASSETS

Have you or the other party sold or transferred ownership of any asset in the last 12 months?

Yes  No

Have you or the other party withdrawn funds from an account in the last 12 months for a purpose other than paying normal household expense payments?  Yes  No

If you answered "Yes" to either of the above questions, please list asset sold or transferred OR account from which withdrawal was made, amounts received or withdrawn and any expenditure made from amounts received.

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YOU MUST COMPLETE THE REMAINING PAGES OF THIS FORM IF YOU ANSWERED "YES" TO ANY OF THE QUESTIONS ABOVE. IF YOU ANSWERED "NO" TO ALL QUESTIONS ABOVE, THEN YOU DO NOT HAVE TO COMPLETE THE REMAINING PAGES OF THIS FORM.

**SECTION I - REAL ESTATE**

Description of Property Including Location	Market Value	Mortgages, Liens, Attachments	Equity (value minus liens)
Primary Residence: _____			
Second Home: _____			
Camp: _____			
Timeshare: _____			
Unimproved Land: _____			
Mobile Home: _____			
Residential Rental Real Estate Owned: _____			
Commercial Real Estate: _____			
Other Real Estate Interests: a. _____			
b. _____			
c. _____			
d. _____			
e. _____			
<b>TOTAL VALUE OF REAL ESTATE INTERESTS</b>			

**IF ANY OF THE ABOVE PROPERTIES GENERATE RENTAL INCOME, YOU MUST EITHER:**

**1. ATTACH SCHEDULE E FROM YOUR LAST 2 TAX RETURNS**

*or if you did not file taxes*

**2. FILL OUT RENTAL INCOME ATTACHMENT (Page 10 of Form 813A)**

## SECTION II - PERSONAL PROPERTY

Please list all personal property owned by you and/or the other party. In estimating the market value, please use the amount you could reasonably receive if you sold the item today. Do not use the purchase price or replacement value.

Description of Items	Market Value	Check if item is in your possession	Loans/debts on property	Person paying on loan/debt
Jewelry				
Antiques				
Artwork				
Guns				
Coins/Stamps				
Tools				
Collectibles				
Piano/Musical instruments				
China/Crystal/Silverware				
Appliances				
Electronics				
Furnishings				
Computers				
Other:				
a. _____				
b. _____				
c. _____				

**SECTION III - VEHICLES and BOATS**

"Market value" for motor vehicles is the retail value indicated in the NADA Blue Book or other similar price guide.

Title Holder	Vehicle Description (Year, make, model)	Market Value	Outstanding Loan Amount	Equity (Value minus Loan)
	Car #1			
	Car #2			
	Truck #1			
	Truck #2			
	Motorcycle #1			
	Motorcycle #2			
	Boat #1			
	Boat #2			
	Snowmobile #1			
	Snowmobile #2			
	ATV #1			
	ATV #2			
	Camper			
	RV			
	Plane			
	Other Vehicles:			
	_____			
	_____			

**SECTION IV - BUSINESS OWNERSHIP**

Owner	Name of Business, Type of Business Activity and Legal Structure of Business (e.g. Sole proprietor, Partnership, Corporation, S- Corporation)	% of Interest Owned	Date of last valuation	Fair Market Value

You Must Attach an 813A Self Employment Attachment or a Schedule C and/or Form K-1 from your last two (2) federal income tax returns for any business from which you earn or receive income, profits, distributions, in-kind income, etc.

SECTION V - INVESTMENTS

Owner	Type of Investment (stocks, bonds, annuities, mutual funds, trusts, etc.)	Description (name of company, fund, bank, trust and trustee etc.)	Number of Shares	Market Value

SECTION VI - BANK ACCOUNTS and CASH

Owner	TYPE OF ACCOUNT	Bank	Current Balance
	Checking Account #1		
	Checking Account #2		
	Savings Account #1		
	Savings Account #2		
	Money Market Account #1		
	Money Market Account #2		
	Cash in your possession		
	Tax Exempt College Funds or Other College Savings accounts		
	Health Savings Accounts		
	Other Accounts		

SECTION VII - ACCOUNTS/ FUNDS HELD FOR YOUR OR THE OTHER PARTY'S BENEFIT

Trustee or Holder	Name of Beneficiary	Type of Account	Current Value

**SECTION VIII - LIFE INSURANCE POLICIES**

Name Of Insured	Beneficiary	Company	Face Value	Loan Balance	Cash Value

**SECTION IX - RETIREMENT ACCOUNTS**

Owner	ACCOUNT TYPE	Financial Institution	Value
	IRA #1		
	IRA #2		
	401(k) #1		
	401(k) #2		
	403(b)		
	TIAA/CREF		
	Keough		
	TDSP		
	TSA		
	Profit Sharing		
	Savings & Security Program		
	Deferred Compensation		
	Other		
	Other		

**SECTION X - PENSIONS**

Owner	TYPE OF PENSION	Pension Administrator	Value
	Defined Benefit		
	Defined Contribution		
	Target Benefit		
	Military Pension		
	SEP		