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MANDATORY DISCLOSURE DOCUMENTS

Florida Family Law Rules of Procedure §12.285(2):

Items 1 - 3 must be provided before a temporary hearing for determination of temporary financial relief

Items 1- 18 must be provided within 45 days of Respondent's receipt of Petition for Dissolution of Marriage or Petition for Modification - for determination of permanent financial relief.

1. Financial Affidavit in conformity with form 12.901(d) or 12.901(e)
(Filing of a Financial Affidavit cannot be waived.)
 Attached
 Previously provided
 Not applicable
 Unable to obtain; not in custody or possession of this party
 Other: _____

2. All personal (1040) federal tax, gift tax, and intangible personal property tax returns for the past three years;
INCLUDING W-2, K-1, and 1099 FORMS: (For temporary relief only, provide for the past year).
 Attached
 Previously provided
 Not applicable
 Unable to obtain; not in custody or possession of this party
 Other: _____

3. Pay stubs or other evidence of earned income for the three (3) months prior to delivery of the Financial Affidavit.
 Attached
 Previously provided
 Not applicable
 Unable to obtain; not in custody or possession of this party
 Other: _____

4. A statement identifying the source and amount of all income for the 3 months before the service of the financial affidavit, if not reflected on the pay stubs produced.
 Attached
 Previously provided
 Not applicable
 Unable to obtain; not in custody or possession of this party
 Other: _____

5. All loan applications and financial statements prepared for any purpose or used for any purpose within the 12 months preceding the service of the financial affidavit.
 Attached
 Previously provided
 Not applicable
 Unable to obtain; not in custody or possession of this party
 Other: _____

6. All deeds to real estate in which I presently own or owned an interest within the past 3 years. All promissory notes in which I presently own or owned an interest within the last 12 months. All present leases in which I own an interest.
____ Attached
____ Previously provided
____ Not applicable
____ Unable to obtain; not in custody or possession of this party
____ Other: _____
7. All periodic statements for the last 3 months for all checking accounts and for the last year for all savings accounts, money market funds, certificates of deposit, etc.
____ Attached
____ Previously provided
____ Not applicable
____ Unable to obtain; not in custody or possession of this party
____ Other: _____
8. All brokerage account statements for the last 12 months.
____ Attached
____ Previously provided
____ Not applicable
____ Unable to obtain; not in custody or possession of this party
____ Other: _____
9. Most recent statement for any pension, profit sharing, deferred compensation, or retirement plan (for example, IRA; 401(k), 403(1;), SEP, KEOGH, etc.) and summary plan description for any such plan in which I am a participant or alternate payee.
____ Attached
____ Previously provided
____ Not applicable
____ Unable to obtain; not in custody or possession of this party
____ Other: _____
10. The declarations page, the last periodic statement, and the certificate for any group insurance for all life insurance policies insuring my life or the life of my spouse.
____ Attached
____ Previously provided
____ Not applicable
____ Unable to obtain; not in custody or possession of this party
____ Other: _____
11. All health and dental insurance cards covering either of me or my spouse and/or our dependent child(ren).
____ Attached
____ Previously provided
____ Not applicable
____ Unable to obtain; not in custody or possession of this party
____ Other: _____
12. Corporate, partnership, and trust tax returns for the last 3 tax years, in which I have an ownership or interest greater than or equal to 30%.
____ Attached
____ Previously provided
____ Not applicable
____ Unable to obtain; not in custody or possession of this party
____ Other: _____

13. All credit card and charge account statements and other records showing my(our) indebtedness as of the date of the filing of this action and for the prior 3 months. All promissory notes on which I presently owe or owed within the past year. All lease agreements I presently owe.

_____ Attached

_____ Previously provided

_____ Not applicable

_____ Unable to obtain; not in custody or possession of this party

_____ Other: _____

14. All written premarital and marital agreements entered into at any time either before or during the marriage.

_____ Attached

_____ Previously provided

_____ Not applicable

_____ Unable to obtain; not in custody or possession of this party

_____ Other: _____

15. If a modification proceeding, all written agreements entered into between the parties at any time since the order to be modified was entered.

_____ Attached

_____ Previously provided

_____ Not applicable

_____ Unable to obtain; not in custody or possession of this party

_____ Other: _____

16. All documents and tangible evidence relating to claims for special equity or non-marital status of an asset or debt.

_____ Attached

_____ Previously provided

_____ Not applicable

_____ Unable to obtain; not in custody or possession of this party

_____ Other: _____

17. Any court order directing that I pay or receive spousal support (alimony) or child support.

_____ Attached

_____ Previously provided

_____ Not applicable

_____ Unable to obtain; not in custody or possession of this party

_____ Other: _____