



A Mindful Mediation, LLC

The empowering, efficient & effective path to divorce

13 James Street, Office 3, Morristown, NJ 07960

973-998-0333

amindfulmediation@gmail.com

www.mindfulmediation.net

Assets and Liabilities

Name _____

Date _____

Each spouse should complete a worksheet, even if information is repeated. Use additional sheets if necessary. Bring the latest statements for each account.

J = Joint, H = Husband, W = Wife, C = Children

Marital Home:

Date purchased: _____ Purchase amount: \$ _____

Title in name of: J / H / W / Other: _____

Value today: \$ _____ Appraised? Y / N

Mortgage balance: \$ _____ Remaining term: _____

Home Eq./HELOC balance #1: \$ _____

Home Eq./HELOC balance #2: \$ _____

Other real property:

Date purchased: _____ Purchase amount: \$ _____

Title in name of: J / H / W / Other: _____

Value today: \$ _____ Appraised? Y / N

Mortgage balance: \$ _____ Remaining term: _____

Home Eq./HELOC balance #1: \$ _____

Home Eq./HELOC balance #2: \$ _____

Vehicle #1:

Year/Make/Model: _____ Title: J / H / W / Other

Miles on vehicle: _____ Loan balance/term: \$ _____

Blue book wholesale value: \$ _____

Vehicle #2:

Year/Make/Model: _____ Title: J / H / W / Other

Miles on vehicle: _____ Loan balance/term: \$ _____

Blue book wholesale value: \$ _____

Vehicle #3:

Year/Make/Model: _____ Title: J / H / W / Other

Miles on vehicle: _____ Loan balance/term: \$ _____

Blue book wholesale value: \$ _____

Do either of you have a non-term life insurance policy? _____ Cash value: _____

Do either of you own a business? _____ If so, please detail:

Other assets: _____

(S)avings/(C)hecking/(M)oney Market Accounts

Acct Type	J / H / W	Bank Name & Acct #	Balance	As of
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Retirement Accounts (401k, IRA, Defined-benefit pension, Other)

Acct Type	J / H / W	Bank Name & Acct #	Balance	As of
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Non-retirement investments (brokerage/mutual funds/options/grants/education accounts/529s)

Acct Type	J / H / W	Bank Name & Acct #	Balance	As of
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Credit cards: (V)isa, (M)astercard, (A)mex, (D)iscover, (S)fore card

Acct Type	J / H / W	Bank Name & Acct #	Balance	As of
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

List any other debts (such as outstanding medical bills, student loans) on an additional sheet of paper.