

FINANCIAL DISCLOSURE STATEMENT CHECKLIST
MILWAUKEE COUNTY
(for internal MJC use only)

WHAT TO INCLUDE TO MAKE SURE FORM IS COMPLETED CORRECTLY

- Pay stub, or other proof of income/benefits is attached.
- Monthly Income (Section 4) completed fully, with all numbers representing *monthly* amounts (see guide at top of form section for calculations). Include all information from pay stub or other proof of income.
- Anticipated Monthly Expenses (Section 5) completed fully, with all entries as accurate as possible, to the best of the client's knowledge.
- Assets (Section 6, Pages 4-6) all properly noted and positively identified as necessary, including who has current ownership and physical possession. Make sure amounts owed and current values are completed.
- Medical, Homeowners/Renters, Automobile, Other Insurance (Section 7), make sure all policies are listed, including account numbers (and group numbers where applicable). If client does not have these, advise them to bring them to Part 2 appointment.
- Debts (Section 8), list all creditors (credit cards, mortgage, student loans, car loans, personal loans, bills in collection, overdue utility and/or medical bills), who is currently (supposed to be) paying these bills, and include creditor's address in left-hand column.
- All Sections, place a "none," "N/A," or "0" in all sections that list assets or debts that the client does not possess. Place a "0" in all amounts not applicable in the Monthly Income and Anticipated Monthly Expenses sections.

THINGS TO CONSIDER

- Has the client scheduled an appointment for Part 2 help? Confirm client's dismissal date.
- Will the client(s) continue to file their Part 2 the same way they filed their Part 1? (That is, if they started off as a Joint filing, are they continuing to agree on everything, or are they switching to Contested?)
- Advise client to get an annual credit report (via www.annualcreditreport.com). Provides lots of helpful information regarding debts.
- Has the other party been served? Was service proper? Has the client received proof?
- If service is incomplete, does the client need to publish service? Check dates and also offer help if they need help filling out a Publication Summons.
- Has the client considered how to divide and distribute all assets *and* debts?
- Will the client be seeking spousal maintenance? If so, has the client considered how much he/she will ask for, and for what period of time? They should bring this information with them to Part 2 appointment.
- Advise the client that listing all debts accurately and completely is *very important* because they will again be listed on the (Proposed) Marital Settlement Agreement, and orders on who will be paying those debts will be made in the final findings of the court.
- Will the client be keeping their married last name, or will he/she be returning to a previous last name?

IF FILING WITH CHILDREN

- Has the client completed or signed up for their Parent Education Class?
- Have they thought about a parenting plan? Advise the client to bring this information with them to their Part 2 appointment.
- Will the client be seeking child support? If so, has the client considered how much he/she will ask for? They should bring this information with them to Part 2 appointment.

