



Taylor *Bracewell*

Your legal team | Your success

Family Law

Children Agreements & Orders v1

Call the Family Team on 01302 640 409

Email family@taylorbracewell.co.uk

Visit www.TaylorBracewell.co.uk

Partners

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Consultant - Ian D Potter





Financial Disclosure

Please provide disclosure in writing, along with documentary evidence in support of the following (where applicable):-

1. Confirmation of your gross and net income for the current and last financial year and from any source along with details of any benefits in kind.
2. Three months wages slips.
3. P60 for the last financial year.
4. If you are self-employed a set of accounts for the last 3 financial years and annual net profit and loss accounts for the last 3 financial years.
5. Details of any Bank/Building Society Accounts either in your sole name, joint names with any other person or in which you have any interest.
6. Last 12 months Statements for any account listed in answer to question 5 above.
7. Details of any property or land or buildings in which you have an interest along with a Valuation, confirmation of your mortgage outstanding if applicable, the most recent mortgage statement and a redemption figure.
8. Details of any Endowment/Life Policies to include the institution with whom it is held, Policy Number, Policy Type, Name Holder, Surrender Value, Expected Date of Maturity and if the Policy is assigned or charged.
9. Details of any Tessa's, ISA's, PEPS or other savings schemes to include the institution, reference, name of holder and value.
10. Details of any National Savings Certificates, Premium Bonds or other Bonds to include the reference number, name of holder and value.
11. Details of any Stocks, Shares and Gilts and other quoted securities along with their value.



12. Details of any Pension or AVC you may have to include the Policy Number, cash equivalent transfer value, lump sum payable on death, earliest date benefit can be paid, estimated lump sum and monthly provision, estimated monthly provision without lump sum, Spouses benefit, Dependent's benefit.
13. Details of any other assets you may hold, to include their values not already specifically referred to above.
14. Details of any monies owed to you.
15. Details in relation to any debts for which you are liable.
16. Details of any personal belongings individually worth more than £500.00 including cars, collections, pictures, jewellery, furniture and household belongings.
17. Details of any CSA Assessment including the date of the Assessment, and the amount payable.
18. Confirmation of your outgoings.

You **MUST NOT** use the self help approach with regard to your spouse's financial documents whether, for example, from a computer, i phone, intercepted e mails, locked or unlocked filing cabinets, opened or unopened documents lying around the house or elsewhere. It is not lawful to copy or use such material. Serious consequences could follow a breach such as an injunction, civil damages claim, criminal proceedings and possibly a change of solicitors.

Please note that the duty to disclose information in relation to your circumstances is an ongoing one and you must inform us of any changes in your circumstances until matters are concluded.



Need more information?

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