**VLA FDRS file number:** Click or tap here to enter text.**C**

**YOUR NAME:** Click or tap here to enter text.

**OTHER PARTY NAME:** Click or tap here to enter text.

# Financial statement - Family Dispute Resolution Service (FDRS)

## Who is this form for?

If you are using Victoria Legal Aid Family Dispute Resolution Service to help you sort out a financial settlement with your former partner, you must fill in this form, with advice from your lawyer. Under family law, each person must provide to the other person in the dispute full details about their financial situation (assets, income and debts). This is called ‘full and frank disclosure’.

**We cannot go ahead with your case until you complete this form and send it back to us, with supporting documents**

## How is the information I put in this form used?

### Exchanging documents and sharing with a mediator

After you have completed this form, your lawyer or VLA FDRS will send a copy to the other person (or their lawyer). The FDRS Case Manager will keep a copy on the file, and share it with the mediator, if your case is booked for a conference.

### Confidentiality

This form is confidential and cannot be used in court, under the *Legal Aid Act 1978*, unless VLA and you consent, or it is required by law. Victoria Legal Aid (VLA) complies with the *Information Privacy Act 2000* and all personal information is managed in accordance with the Privacy Principles. To view VLA’s privacy policy visit [www.legalaid.vic.gov.au](http://www.legalaid.vic.gov.au) or for more information contact VLA’s Privacy Officer.

## What documents should send in with this form?

You should provide documents that prove what you say in this form, for example bank statements to support your income estimate, or a real estate appraisal for property.

Please return your completed form and supporting documents to:

**VLA Family Dispute Resolution Service**

E-mail: [fdrs@vla.vic.gov.au](mailto:fdrs@vla.vic.gov.au) (scan and email) Fax: 03 9269 0530

Post: Victoria Legal Aid

GPO Box 4380, Melbourne 3001

DX 210646 Melbourne VIC

If you have any questions call: 03 9269 0500 or 1800 136 832

## Lawyer statement and acknowledgment

I have read through this financial statement with my client

I have attached all relevant and required supporting documents provided by my client

I have performed relevant title and business searches

If appropriate, I have considered writing to the relevant superannuation fund(s) to afford procedural fairness

I have read and understood the [Guide for lawyers at Victoria Legal Aid Family Dispute Resolution Service](https://www.legalaid.vic.gov.au/information-for-lawyers/using-our-family-dispute-resolution-service)

**Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**🖉** Your lawyer will complete this page

## Lawyer’s summary of issues

### Client details

Your client’s name: Click or tap here to enter text. Your client’s age: Click or tap here to enter text.

Other party’s name: Click or tap here to enter text. Other party’s age: Click or tap here to enter text.

### Relationship details

Married  De facto  Other

Duration of cohabitation/marriage: Click or tap here to enter text.

Date of separation: Click or tap here to enter text.

### Children of the relationship (if applicable)

Name: Click or tap here to enter text. Date of birth: Click or tap here to enter text.

Name: Click or tap here to enter text. Date of birth: Click or tap here to enter text.

Name Click or tap here to enter text.: Date of birth: Click or tap here to enter text.

## Anticipated issues in dispute

### Valuations

Click or tap here to enter text.

### Contributions

Click or tap here to enter text.

### Future needs

Click or tap here to enter text.

### Other

Click or tap here to enter text.

# Section 1 – Your current income and support

## Your weekly income (before tax)

| Type of income/support | $ Amount you receive | Frequency |
| --- | --- | --- |
| **Pensions/benefits/allowances**  (like Newstart or Parenting Payment, but not Family Tax Benefit) | $ Enter amount | Enter frequency |
| If benefit, details: Click or tap here to enter text. |  |  |
| **Income – employment** | $ Enter amount | Enter frequency |
| If employed, name of employer: Click or tap here to enter text. |  |  |
| **Business / self-employed** | $ Enter amount | Enter frequency |
| If business/self-employed, details: Click or tap here to enter text. |  |  |
| **Compensation payments** | $ Enter amount | Enter frequency |
| If compensation received, from whom: Click or tap here to enter text. |  |  |
| **Work benefits**  (such as car, phone, tips, bonuses, salary sacrifice) | $ Enter amount | Enter frequency |
| **Child support payments received** | $ Enter amount | Enter frequency |
| If child support paid, who is it paid by: Click or tap here to enter text. |  |  |
| If child support paid, which child is it paid for: Click or tap here to enter text. |  |  |
| **Share/investment income** | $ Enter amount | Enter frequency |
| **Other (give details)** | $ Enter amount | Enter frequency |
| **Total income** | **$ Enter amount** |  |

## 2. Weekly financial support provided to you by other people

| **Support provided by others** | **$ Amount you receive** | **Frequency** |
| --- | --- | --- |
| Name and relationship of person to you:  Click or tap here to enter text. | $ Enter amount | Enter frequency |

# Section 2 – Assets and debts

* Please fill in and attach the valuation or proof of these assets and debts. Add extra pages if you need

## 3. Assets (what you own)

| **Type of asset** | **$ Value** | **In whose name** |
| --- | --- | --- |
| Real estate: address |  |  |
| Address 1: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |
| Address 2: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |
| Bank account: account number and bank details |  |  |
| Account 1: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |
| Account 2: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |
| Motor vehicle, caravan or trailer: make model & year |  |  |
| Vehicle 1: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |
| Vehicle 2: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |
| Vehicle 3: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |
| Shares: number and company name |  |  |
| Shares: Click or tap here to enter text. | Proof attached? |  |
|  | $ Enter amount | Enter name |

**🖉** *Proof of income and assets includes documents like recent bank, credit card or superannuation statements, house valuations, a redbook.com.au valuation of a car, or loan or business documents*

|  |  |  |
| --- | --- | --- |
| Superannuation: fund name and details | $ Value | In whose name |
| Fund 1 – Fund name and details: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Fund 2 – Fund name and details: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Interest in business/farm: name, type & other details | $ Value | In whose name |
| Business/farm: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Interest in deceased estate: name and details | $ Value | In whose name |
| Estate: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Other assets: details | $ Value | In whose name |
| Estate: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Total assets | $ Enter total |  |

## 4. Debts (what you currently owe)

| **Type of debt/liability** | **$ Amount owing** | **In whose name** |
| --- | --- | --- |
| Mortgage: property address and lender details |  |  |
| Address 1: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Address 2: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Loan: bank account number and bank details |  |  |
| Account 1: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Account 2: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Hire purchase agreement: account details and lender |  |  |
| Item 1: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Motor vehicle loan/finance: account details and lender |  |  |
| Vehicle 1: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Credit card: account number and lender |  |  |
| Credit card: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| ATO tax debt: details |  |  |
| ATO debt: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Child support debt: child and other details |  |  |
| Names of children owed for: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Other debts |  |  |
| Other: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Other: Click or tap here to enter text. | $ Enter amount | Enter name |
|  | Proof attached? |  |
| Total debts (what is currently owed) | $ Enter total |  |

# Section 3 – Contributions

## 5. Lump sum contributions to the assets

| **Type of contribution** | **$ You contributed** | **$ They contributed** |
| --- | --- | --- |
| Significant assets brought into the relationship: details of asset and date of contribution |  |  |
| Asset: Click or tap here to enter text. | $ Enter amount | Enter amount |
|  | Proof attached? |  |
| Gifts, inheritances received: details of gift/inheritance and date of contribution |  |  |
| Gift/inheritance: Click or tap here to enter text. | $ Enter amount | Enter amount |
|  | Proof attached? |  |
| Compensation payments received: details and dates of payment |  |  |
| Compensation: Click or tap here to enter text. | $ Enter amount | Enter amount |
|  | Proof attached? |  |
| Other lump sum contributions: details and date of contribution |  |  |
| Other contribution: Click or tap here to enter text. | $ Enter amount | Enter amount |
|  | Proof attached? |  |

## 6. Contributions to the assets during the relationship

| **Type of contribution** | **You contributed (tick if yes)** | **They contributed (tick if yes)** |
| --- | --- | --- |
| Earning income (wages/salary) |  |  |
| Details: Click or tap here to enter text. |  |  |
| Caring for children of marriage/relationship |  |  |
| Details: Click or tap here to enter text. |  |  |
| Improving the property (such as renovations) |  |  |
| Details: Click or tap here to enter text. |  |  |
| Contribution to family life |  |  |
| Details: Click or tap here to enter text. |  |  |

## 7. Contributions to the assets after separation

| **If yes, tick and provide details (such as paying mortgage, caring for children)** | **You contributed (tick if yes)** | **They contributed (tick if yes)** |
| --- | --- | --- |
| Details: Click or tap here to enter text. |  |  |
|  |  |  |
| If financial contribution: | $ Enter amount | $ Enter amount |
|  | Proof attached? |  |

# Section 4 – Future needs

* Include information in this section about your health, your care of children and other things that may affect your future financial situation

## 8. Information about you

### Your health

# (Give details if you have health issues that affect your ability to work. Attach a copy of any medical report)  Medical reports attached?

Click or tap here to enter text.

### Care of children

# (Give details if you have children living or spending time with you. Attach a copy of any written agreement, parenting plan or court orders regarding care of children)  Orders/written agreement attached?

Click or tap here to enter text.

### Eligibility for pensions/benefits:

(Give details if different from current benefits)

Click or tap here to enter text.

### Child support you must pay (give details), and children it supports:

Click or tap here to enter text.

### Anything else that might affect your future financial situation:

# (For example, expected compensation or inheritances, financial resources)

Click or tap here to enter text.

## Section 5 – Spousal maintenance

! Please only complete this section if you or the other person is applying for spousal maintenance

| **Type of expense** | **$ Total** | **Your %** | **Children (living with you)** | **Other adults (living with you)** |
| --- | --- | --- | --- | --- |
| Income tax |  |  |  |  |
| Mortgage/rent |  |  |  |  |
| Loan repayments |  |  |  |  |
| Credit card payments |  |  |  |  |
| Telephone |  |  |  |  |
| Gas & electricity |  |  |  |  |
| Rates & water |  |  |  |  |
| Internet |  |  |  |  |
| Household insurance |  |  |  |  |
| Groceries |  |  |  |  |
| House repairs/maintenance |  |  |  |  |
| Gardening |  |  |  |  |
| Motor vehicle  – registration & insurance  – petrol & servicing |  |  |  |  |
| Public transport/car parking |  |  |  |  |
| Clothing and shoes |  |  |  |  |
| Children’s activities & childcare |  |  |  |  |
| Child support you pay |  |  |  |  |
| Private health insurance |  |  |  |  |
| Medical, dental & pharmacy |  |  |  |  |
| Entertainment/hobbies |  |  |  |  |
| Holidays |  |  |  |  |
| Education expenses |  |  |  |  |
| Pets (food, vet bills) |  |  |  |  |
| Gifts |  |  |  |  |
| Hairdressing, beauty |  |  |  |  |
| Other (provide details) |  |  |  |  |
| Total weekly expenses: |  |  |  |  |

# Section 6 – Your initial proposal for settlement

* Use this section to help you consider your initial thoughts on dividing finances

## You keep

| **Assets** | **$ Value** |
| --- | --- |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
|  |  |
| Total assets you will keep | $  **Enter amount** |

| **Debts** | **$ Value** |
| --- | --- |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
|  |  |
| Total debts you will keep | $  **Enter amount** |

| **Superannuation details and value** | **$ Value** |
| --- | --- |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
|  |  |
| Total superannuation you will keep | $  **Enter amount** |

# Section 6 – Your initial proposal for settlement, continued

* Use this section to help you consider your initial thoughts on dividing finances

## The other person keeps

| **Assets** | **$ Value** |
| --- | --- |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
|  |  |
| Total assets they will keep | $  **Enter amount** |

| **Debts** | **$ Value** |
| --- | --- |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
|  |  |
| Total debts they will keep | $  **Enter amount** |

| **Superannuation details and value** | **$ Value** |
| --- | --- |
| 1. Click or tap here to enter text. | $ Enter amount |
| 1. Click or tap here to enter text. | $ Enter amount |
|  |  |
| Total superannuation they will keep | $  **Enter amount** |

# Section 7 – Client acknowledgement

* You must now sign the form to acknowledge the information you have provided is true and correct. This page should be witnessed by another adult over the age of 18 years*.*

I, (enter name) …………………………………………….

of (enter address) …………………………………………….

1. acknowledge that the information I have provided in this form is true and correct to the best of my knowledge
2. have attached the documents I need to, to prove the information I have written in this form
3. understand that this form will be provided to FDRS and shared with the other party before any FDRS conference goes ahead.

**Your signature**: ……………………………………………. Date: …………………………………………….

**Witness signature**: ……………………………………………. Date: …………………………………………….

## Before you send in this financial statement, check you have:

Answered all relevant questions

Attached copies of all financial documents relevant to your case

(like bank statements, property valuation, superannuation statement)

Attached copies of all other/court/legal documents that may be relevant, such as a parenting agreement

Signed the ‘Client acknowledgement' in front of a witness

* You can use this page, or add extras, if you require additional space to provide financial information.

## More information

To contact VLA Family Dispute Resolution Service:

**Call 1800 136 832 (toll free) or (03) 9269 0500**

Email fdrs@vla.vic.gov.au

www.legalaid.vic.gov.au/fdrs

If you find it hard to hear or speak you can use the National Relay Service to call us

If you require a more accessible version of this form, please let us know.

We encourage you to tell us how you found working with FDRS.

\*If you do not have a lawyer, you can call Legal Help on **1300 792 387**