INSTRUCTIONS FOR FLORIDA FAMILY LAW RULES OF PROCEDURE FORM 12.902(c) FAMILY LAW FINANCIAL AFFIDAVIT (LONG FORM) (10/21)

When should this form be used?

This form should be used when you are involved in a family law case which requires a <u>financial affidavit</u> and your individual gross income is \$50,000 OR MORE per year unless:

- (1) You are filing a simplified dissolution of marriage under rule 12.105 and both parties have waived the filing of financial affidavits;
- (2) you have no minor children, no support issues, and have filed a written settlement agreement disposing of all financial issues; or
- (3) the court lacks jurisdiction to determine any financial issues.

This form should be typed or printed in black ink. After completing this form, you should sign the form. You should then **file** this document with the <u>clerk of the circuit court</u> in the county where the <u>petition</u> was filed and keep a copy for your records.

What should I do next?

A copy of this form must be served on the other **party** in your case within 45 days of being served with the petition, if it is not served on him or her with your initial papers. **Service** must be in accordance with Florida Rule of General Practice and Judicial Administration 2.516.

A copy of this form must be filed with the court and served on the other party or his or her attorney. The copy you are serving to the other party must be either mailed, e-mailed, or hand-delivered to the opposing party or his or her attorney on the same day indicated on the certificate of service. If it is mailed, it must be postmarked on the date indicated in the certificate of service.

Where can I look for more information?

Before proceeding, you should read "General Information for Self-Represented Litigants" found at the beginning of these forms. The words that are in "<u>bold underline</u>" in these instructions are defined there. For further information, see Florida Family Law Rule of Procedure 12.285.

IMPORTANT INFORMATION REGARDING E-FILING

The Florida Rules of General Practice and Judicial Administration now require that all petitions, pleadings, and documents be filed electronically except in certain circumstances. **Self-represented litigants may file petitions or other pleadings or documents electronically; however, they are not required to do so.** If you choose to file your pleadings or other documents electronically, you must do so in accordance with Florida Rule of General Practice and Judicial Administration 2.525, and you must follow the procedures of the judicial circuit in which you file. The rules and procedures should be carefully read and followed.

IMPORTANT INFORMATION REGARDING E-SERVICE ELECTION

After the initial service of process of the petition or supplemental petition by the Sheriff or certified process server, the Florida Rules of General Practice and Judicial Administration now require that all documents required or permitted to be served on the other party must be served by electronic mail (e-mail) except in certain circumstances. **You must strictly comply with the format requirements set forth in the Florida Rules of General Practice and Judicial Administration**. If you elect to participate in electronic service, which means serving or receiving pleadings by electronic mail (e-mail), or through the Florida Courts E-Filing Portal, you must review Florida Rule of General Practice and Judicial Administration 2.516. You may find this rule at www.flcourts.org through the link to the Rules of General Practice and Judicial Administration provided under either Family Law Forms: Getting Started, or Rules of Court in the A-Z Topical Index.

SELF-REPRESENTED LITIGANTS MAY SERVE DOCUMENTS BY E-MAIL; HOWEVER, THEY ARE NOT REQUIRED TO DO SO. If a self-represented litigant elects to serve and receive documents by email, the procedures must always be followed once the initial election is made.

To serve and receive documents by e-mail, you must designate your e-mail addresses by using the Designation of Current Mailing and E-mail Address, Florida Supreme Court Approved Family Law Form 12.915, and you must provide your e-mail address on each form on which your signature appears. Please CAREFULLY read the rules and instructions for: Certificate of Service (General), Florida Supreme Court Approved Family Law Form 12.914; Designation of Current Mailing and E-mail Address, Florida Supreme Court Approved Family Law Form 12.915; and Florida Rule of General Practice and Judicial Administration 2.516.

Special notes ...

If you want to keep your address confidential because you have been found by a judge to be the victim of sexual battery, aggravated child abuse, aggravated stalking, harassment, aggravated battery, or domestic violence do not enter the address, telephone, and fax information at the bottom of this form. Instead, file **Request for Confidential Filing of Address**, Florida Supreme Court Approved Family Law Form 12.980(h).

The affidavit must be completed using **monthly** income and expense amounts. If you are paid or your bills are due on a schedule which is not monthly, you must convert those amounts. Hints are provided below for making these conversions.

Hourly - If you are paid by the hour, you may convert your income to monthly as follows:					
Hourly amount	х	Hours worked per week	=	Weekly amount	
Weekly amount	х	52 Weeks per year	=	Yearly amount	
Yearly amount	÷	12 Months per year	=	Monthly Amount	
Daily - If you are paid b	y the da	y, you may convert your income	to mont	hly as follows:	
Daily amount	х	Days worked per week	=	Weekly amount	
Weekly amount	х	52 Weeks per year	=	Yearly amount	
Yearly amount	÷	12 Months per year	=	Monthly Amount	
Weekly - If you are pai	d by the	week, you may convert your inco	ome to r	nonthly as follows:	
Weekly amount	х	52 Weeks per year	=	Yearly amount	
Yearly amount	÷	12 Months per year	=	Monthly Amount	
Bi-weekly - If you are p	aid ever	y two weeks, you may convert yo	ur incor	ne to monthly as follows:	
Bi-weekly amount	х	26	=	Yearly amount	
Yearly amount	÷	12 Months per year	=	Monthly Amount	
Semi-monthly - If you	Semi-monthly - If you are paid twice per month, you may convert your income to monthly as				
follows:					
Semi-monthly amount	х	2	=	Monthly Amount	

Expenses may be converted in the same manner.

Remember, a person who is NOT an attorney is called a nonlawyer. If a nonlawyer helps you fill out these forms, that person must give you a copy of a **Disclosure from Nonlawyer**, Florida Family Law Rules of Procedure Form 12.900(a), before he or she helps you. A nonlawyer helping you fill out these forms also **must** put his or her name, address, and telephone number on the bottom of the last page of every form he or she helps you complete.

IN THE CIRCUIT COURT OF THE ______ JUDICIAL CIRCUIT, IN AND FOR _____ COUNTY, FLORIDA

Case No.: Division:

Petitioner,

and

Respondent.

FAMILY LAW FINANCIAL AFFIDAVIT (LONG FORM)

(\$50,000 or more Individual Gross Annual Income)

I, {full legal name}	_, being sworn, certify
that the following information is true:	

SECTION I. INCOME

- 1. My age is: _____
- 2. My occupation is: _____
- 3. I am currently

[Check **all** that apply]

a. Unemployed

Describe your efforts to find employment, how soon you expect to be employed, and the pay you expect to receive:

b. ____ Employed by: _____

Address	

City, State, Zip code: Telephone Number:

Pay rate: \$) everv week () every other week () twice a month

() monthly () other:

If you are expecting to become unemployed or change jobs soon, describe the change you expect and why and how it will affect your income:

Check here if you currently have more than one job. List the information above for the second job(s) on a separate sheet and attach it to this affidavit.

c Retired. Date of reti	rement:	
Employer from whom retired:		
Address:		
City, State, Zip code:	Т	elephone Number:
LAST YEAR'S GROSS INCOME:	Your Income	Other Party's Income (if known)
YEAR	\$	\$

PRESENT MONTHLY GROSS INCOME:

All amounts must be MONTHLY. See the instructions with this form to figure out money amounts for anything that is NOT paid monthly. Attach more paper, if needed. Items included under "other" should be listed separately with separate dollar amounts.

- 1. \$_____ Monthly gross salary or wages
- 2. _____ Monthly bonuses, commissions, allowances, overtime, tips, and similar payments
- 3. _____ Monthly business income from sources such as self-employment, partnerships, close corporations, and/or independent contracts (Gross receipts minus ordinary and necessary expenses required to produce income.)(Attach sheet itemizing such income and expenses.)
- 4. _____ Monthly disability benefits/SSI
- 5. _____ Monthly Workers' Compensation
- 6. _____ Monthly Unemployment Compensation
- 7. _____ Monthly pension, retirement, or annuity payments
- 8. _____ Monthly Social Security benefits
- 9. _____ Monthly alimony actually received (Add 9a and 9b)
 - 9a. From this case: \$_____
 - 9b. From other case(s): \$_____
- 10. _____ Monthly interest and dividends
- 11. _____ Monthly rental income (gross receipts minus ordinary and necessary expenses required to produce income) (Attach sheet itemizing such income and expense items.)
- 12. _____ Monthly income from royalties, trusts, or estates
- 13. _____ Monthly reimbursed expenses and in-kind payments to the extent that they reduce personal living expenses (Attach sheet itemizing each item and amount.)
- 14. _____ Monthly gains derived from dealing in property (not including nonrecurring gains)
- _____ Any other income of a recurring nature (identify source):
- 15. _____ 16.
- 17. **\$______ TOTAL PRESENT MONTHLY GROSS INCOME** (Add lines 1 through 16.)

PRESENT MONTHLY DEDUCTIONS:

All amounts must be MONTHLY. See the instructions with this form to figure out money amounts for anything that is NOT paid monthly.

- 18. \$_____ Monthly federal, state, and local income tax (corrected for filing status and allowable dependents and income tax liabilities)
 - a. Filing Status
 - b. Number of dependents claimed ______
- 19. _____ Monthly FICA or self-employment taxes

- 20. _____ Monthly Medicare payments
- 21. Monthly mandatory union dues
- 22. _____ Monthly mandatory retirement payments
- 23. _____ Monthly health insurance payments (including dental insurance), excluding portion paid for any minor children of this relationship
- 24. _____ Monthly court-ordered child support actually paid for children from another relationship
- 25. _____ Monthly court-ordered alimony actually paid (Add 25a and 25b) 25a. from this case: \$

25b. from other case(s): \$ _____

26. \$ TOTAL DEDUCTIONS ALLOWABLE UNDER SECTION 61.30, FLORIDA STATUTES (Add lines 18 through 25.)

27. \$_____ PRESENT NET MONTHLY INCOME

(Subtract line 26 from line 17.)

SECTION II. AVERAGE MONTHLY EXPENSES

Proposed/Estimated Expenses. If this is a dissolution of marriage case and your expenses as listed below do not reflect what you actually pay currently, you should write "estimate" next to each amount that is estimated.

HOUSEHOLD:

- 1. \$_____ Monthly mortgage or rent payments
- 2. _____ Monthly property taxes (if not included in mortgage)
- 3. _____ Monthly insurance on residence (if not included in mortgage)
- 4. _____ Monthly condominium maintenance fees and homeowner's association fees
- 5. _____ Monthly electricity
- 6. _____ Monthly water, garbage, and sewer
- 7. _____ Monthly telephone
- 8. _____ Monthly fuel oil or natural gas
- 9. _____ Monthly repairs and maintenance
- 10. _____ Monthly lawn care
- 11. _____ Monthly pool maintenance
- 12. _____ Monthly pest control
- 13. Monthly misc. household
- 14. _____ Monthly food and home supplies
- 15. _____ Monthly meals outside home
- 16. _____ Monthly cable t.v.
- 17. _____ Monthly alarm service contract
- 18. _____ Monthly service contracts on appliances
- 19. _____ Monthly maid service
- Other:

20. _____ 21. _____ 22. 23. _____ 24.

25. **\$ SUBTOTAL** (Add lines 1 through 24.)

AUTOMOBILE:

- 26. \$_____ Monthly gasoline and oil
- 27. _____ Monthly repairs
- 28. _____ Monthly auto tags and emission testing
- 29. _____ Monthly insurance
- 30. _____ Monthly payments (lease or financing)
- 31. _____ Monthly rental/replacements
- 32. _____ Monthly alternative transportation (bus, rail, car pool, etc.)
- 33. _____ Monthly tolls and parking
- 34. _____ Other: ___
- 35. **\$_____ SUBTOTAL** (Add lines 26 through 34.)

MONTHLY EXPENSES FOR CHILDREN COMMON TO BOTH PARTIES:

- 36. \$_____ Monthly nursery, babysitting, or day care
- 37. _____ Monthly school tuition
- 38. _____ Monthly school supplies, books, and fees
- 39. _____ Monthly after school activities
- 40. _____ Monthly lunch money

41. _____ Monthly private lessons or tutoring

- 42. _____ Monthly allowances
- 43. _____ Monthly clothing and uniforms
- 44. _____ Monthly entertainment (movies, parties, etc.)
- 45. _____ Monthly health insurance
- 46. _____ Monthly medical, dental, prescriptions (nonreimbursed only)
- 47. _____ Monthly psychiatric/psychological/counselor
- 48. _____ Monthly orthodontic
- 49. _____ Monthly vitamins
- 50. _____ Monthly beauty parlor/barber shop
- 51. _____ Monthly nonprescription medication
- 52. _____ Monthly cosmetics, toiletries, and sundries
- 53. _____ Monthly gifts from child(ren) to others (other children, relatives, teachers, etc.)
- 54. _____ Monthly camp or summer activities
- 55. _____ Monthly clubs (Boy/Girl Scouts, etc.)
- 56. _____ Monthly time-sharing expenses
- 57. _____ Monthly miscellaneous
- 58. **\$_____ SUBTOTAL** (Add lines 36 through 57.)

MONTHLY EXPENSES FOR CHILD(REN) FROM ANOTHER RELATIONSHIP

(other than court-ordered child support)

- 59. \$_____
- 60. _____
- 61. _____
- 62. _____
- 63. **\$______ SUBTOTAL** (Add lines 59 through 62.)

MONTHLY INSURANCE:

- 64. \$_____ Health insurance (if not listed on lines 23 or 45)
- 65. _____ Life insurance
- 66. _____ Dental insurance.
- Other:
- 67._____
- 68._____
- 68._____69. **\$______SUBTOTAL** (Add lines 66 through 68, exclude lines 64 and 65.)

OTHER MONTHLY EXPENSES NOT LISTED ABOVE:

- 70. \$_____ Monthly dry cleaning and laundry
- 71. _____Monthly clothing
- 72. Monthly medical, dental, and prescription (unreimbursed only)
- 73. _____ Monthly psychiatric, psychological, or counselor (unreimbursed only)
- 74. _____ Monthly non-prescription medications, cosmetics, toiletries, and sundries
- 75. _____ Monthly grooming
- 76.____ Monthly gifts
- 77._____ Monthly pet expenses
- 78._____ Monthly club dues and membership
- 79. _____ Monthly sports and hobbies
- 80._____ Monthly entertainment
- 81._____ Monthly periodicals/books/tapes/CDs
- 82.____ Monthly vacations
- 83.____ Monthly religious organizations
- 84._____ Monthly bank charges/credit card fees
- 85.____ Monthly education expenses
- 86._____ Other: (include any usual and customary expenses not otherwise mentioned in the items listed above)_____
- 87._____
- 88._____
- 89.____

90. **\$** SUBTOTAL (Add lines 70 through 89.)

MONTHLY PAYMENTS TO CREDITORS: (only when payments are currently made by you on outstanding balances). List only last 4 digits of account numbers.

MONTHLY PAYMENT AND NAME OF CREDITOR(s):

91. \$	
92	
93	
94	
95	
96	
97	
98	
99	
100	
101	
101	

102.	
103	
104. \$ S	UBTOTAL (Add lines 91 through 103.)
105 . \$ T	OTAL MONTHLY EXPENSES:
	(Add lines 25, 35, 58, 63, 69, 90, and 104 of Section II, Expenses.)
SUMMARY	
106. \$ T	OTAL PRESENT MONTHLY NET INCOME (from line 27 of SECTION I. INCOME)
107. \$ T	OTAL MONTHLY EXPENSES (from line 105 above)
108. \$ S	URPLUS (If line 106 is more than line 107, subtract line 107 from line 106. This is the amount of your surplus. Enter that amount here.)
109 . (\$) (1	DEFICIT) (If line 107 is more than line 106, subtract line 106 from line 107. This is the amount of your deficit. Enter that amount here.)
SECTION III. ASS	SETS AND LIABILITIES

A. ASSETS (This is where you list what you OWN.) INSTRUCTIONS:

<u>STEP 1</u>: In column A, list a description of each separate item owned by you (and/or your spouse, if this is a petition for dissolution of marriage). Blank spaces are provided if you need to list more than one of an item.

<u>STEP 2</u>: If this is a petition for dissolution of marriage, check the line **in Column A** next to any item that you are requesting the judge award to you.

STEP 3: In column B, write what you believe to be the current fair market value of all items listed.

<u>STEP 4</u>: Use column C only if this is a petition for dissolution of marriage and you believe an item is "nonmarital," meaning it belongs to only one of you and should not be divided. You should indicate to whom you believe the item belongs. (Typically, you will only use Column C if property was owned by one spouse before the marriage. See the "General Information for Self-Represented Litigants" found at the beginning of these forms and section 61.075(1), Florida Statutes, for definitions of "marital" and "nonmarital" assets and liabilities.)

A ASSETS: DESCRIPTION OF ITEM(S) LIST ONLY LAST FOUR DIGITS OF ACCOUNT NUMBERS. Check the line next to any asset(s) which you are	B Current Fair Market Value	Current Nonmarital Fair (Check correct colu Market	
requesting the judge award to you.		Petitioner	Respondent
Cash (on hand)	\$		
Cash (in banks or credit unions)			
Stocks/Bonds			
Notes (money owed to you in writing)			
Money owed to you (not evidenced by a note)			
Real estate: (Home)			
(Other)			
Business interests			
Automobiles			
Boats			

(Other vehicles		
F	Retirement plans (Profit Sharing, Pension, IRA,		
4	401(k)s, etc.)		
F	Furniture & furnishings in home		
F	Furniture & furnishings elsewhere		
├			
(Collectibles		
J	lewelry		
	·		
	ife incurrence (each currender value)		
	Life insurance (cash surrender value)		
9	Sporting and entertainment (T.V., stereo, etc.)		
	equipment		
-			
0	Other assets:		
-			
Total As	sets (add column B)	\$	

B. LIABILITIES/DEBTS (This is where you list what you OWE.) INSTRUCTIONS:

<u>STEP 1</u>: In column A, list a description of each separate debt owed by you (and/or your spouse, if this is a petition for dissolution of marriage). Blank spaces are provided if you need to list more than one of an item.

<u>STEP 2</u>: If this is a petition for dissolution of marriage, check the line **in Column A** next to any debt(s) for which you believe you should be responsible.

STEP 3: In column B, write what you believe to be the current amount owed for all items listed.

<u>STEP 4</u>: Use column C only if this is a petition for dissolution of marriage and you believe an item is "nonmarital," meaning the debt belongs to only one of you and should not be divided. You should indicate to whom you believe the debt belongs. (Typically, you will only use Column C if the debt was owed by one spouse before the marriage. See the "General Information for <u>Self-Represented</u> Litigants" found at the beginning of these forms and section 61.075(1), Florida Statutes, for definitions of "marital" and "nonmarital" assets and liabilities.)

A LIABILITIES: DESCRIPTION OF ITEM(S) LIST ONLY LAST FOUR DIGITS OF ACCOUNT NUMBERS.	B Current Amount Owed	C Nonmarital (Check correct column)		
Check the line next to any debt(s) for which you believe you should be responsible.		Petitioner	Respondent	
Mortgages on real estate: First mortgage on home	\$			
Second mortgage on home				
Other mortgages				
Charge/credit card accounts				
Auto loan				
Auto loan				
Bank/Credit Union Ioans				
Money you owe (not evidenced by a note)				
Judgments				
Other:				
Total Debts (add column B)	\$			

C. NET WORTH (excluding contingent assets and liabilities)

- **\$_____Total Assets** (enter total of Column B in Asset Table; Section A)
- **\$_____Total Liabilities** (enter total of Column B in Liabilities Table; Section B)
- \$_____TOTAL NET WORTH (Total Assets minus Total Liabilities)

(excluding contingent assets and liabilities)

D. CONTINGENT ASSETS AND LIABILITIES INSTRUCTIONS:

If you have any **POSSIBLE assets** (income potential, accrued vacation or sick leave, bonus, inheritance, etc.) or **POSSIBLE liabilities** (possible lawsuits, future unpaid taxes, contingent tax liabilities, debts assumed by another), you must list them here.

A Contingent Assets	B Possible Value	(Nonm (Check corre	
Check the line next to any contingent asset(s) which you are requesting the judge award to you.		Petitioner	Respondent
	\$		
Total Contingent Assets	\$		

A Contingent Liabilities	B Possible Amount Owed	C Nonmarital (Check correct column)	
Check the line next to any contingent debt(s) for which you believe you should be responsible.		Petitioner	Respondent
	\$		
Total Contingent Liabilities	\$		

E. CHILD SUPPORT GUIDELINES WORKSHEET. Florida Family Law Rules of Procedure Form 12.902(e), Child Support Guidelines Worksheet, MUST be filed with the court at or prior to a hearing to establish or modify child support. This requirement cannot be waived by the parties.

[Check one only]

- A Child Support Guidelines Worksheet IS or WILL BE filed in this case. This case involves the establishment or modification of child support.
- A Child Support Guidelines Worksheet IS NOT being filed in this case. The establishment or modification of child support is not an issue in this case.

I certify that a copy of this financial affidavit was [check all used]: () e-mailed () mailed, () faxed () hand delivered to the person(s) listed below on *{date}*.

Other party or his/her attorney:

Name:
Address:
City, State, Zip:
Telephone Number:
Fax Number:
E-mail Address(es):

Under penalties of perjury, I declare that I have read this document and the facts stated in it are true.

Dated: _____

Signature of Party
Printed Name:
Address:
City, State, Zip:
Telephone Number:
Fax Number:
E-mail Address(es):

IF A NONLAWYER HELPED YOU FILL OUT THIS FORM, HE/SHE MUST FILL IN THE BLANKS BELOW:

[fill in **all** blanks] This form was prepared for the: {*choose only one*} () Petitioner () Respondent This form was completed with the assistance of:

{name of individual}			
{name of business}			,
{address}			,
{city}	, {state}	, {telephone number}	