

# Connecticut Judicial Branch Self-Represented Parties Information Series

## Filling Out and Filing a Financial Affidavit Short Form

### *Slide 1*

**Welcome to the Connecticut Judicial Branch Law Libraries Self-Represented Parties Information Series.**

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**Filling out and filing a Financial Affidavit Short form.**

In this overview, we will show you the correct way to fill out and file a Financial Affidavit Short form. Financial Affidavits are most often used in divorce, separation and custody cases. The short form is recommended for individuals with a gross annual income and net assets that are less than \$75,000.00. If the total of your gross annual income and net assets is over \$75,000.00, you should use the long form. This overview will focus on the Short form only and will not address the Long form.

The Financial Affidavit, form JD-FM-6-SHORT, which is signed under oath, will ask you to provide the Court with information about your income, expenses, debts and assets. The Court will then use the information when deciding fair orders in alimony and child support. The Financial Affidavit requires you to list your income, expenses, debts and assets on a weekly basis. If your income or expenses are on some other basis, such as monthly or yearly, you will need to calculate, or figure out, how much it is for a week.

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**How this demonstration works-**

In this demonstration, the video in the top screen will show you what to do to fill out the Financial Affidavit Short form. A blank Financial Affidavit Short form is in the bottom screen. You may fill out the form in the bottom screen as we go through this demonstration.

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**Some words to know.**

In this overview, an affidavit is a written statement that is sworn to under oath as being true. Income is any money you receive from work or through investments. It can include pay and wages from jobs, pensions, public assistance, unemployment compensation, and alimony. Expenses are money that you regularly pay or owe for day to day living. These can include rent or mortgage, utilities, food, clothing, transportation, alimony and child care. A liability is any debt that you owe, these can include bills, loans, and credit cards. An asset is any property of value that you own, these can include real estate, motor vehicles, boats, jewelry, bank and savings accounts, insurance, and investments.

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**The Connecticut Practice Book.**

The Court rules on Financial Affidavits can be found in the Connecticut Practice Book at sections 25-30 and 25a-15. The Connecticut Practice Book can be found in any Judicial Branch Law Library and on the Judicial Branch website.

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#### **Connecticut Practice Book.**

To get to the Connecticut Practice Book, from the Judicial Branch home page,

Click on the Public tab.

Click on the quick link for Court Rules.

Click on the link for the current year Connecticut Practice Book.

The Connecticut Practice Book is in PDF format with a linked table of contents on the left hand side. Click on Chapters 25 and 25a, Procedures in Family Matters and Procedures in Family Support Magistrate Matters.

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In the box at the upper right of the form labeled "Docket Number," type the docket number of the case.

In the box below, labeled "For The Judicial District Of," type the Judicial district for the court that your case is filed in. For example, if your case is in the Hartford court, type "Hartford."

In the box labeled "At," type the full address of the court. Include the number, street, city or town, and zip code.

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In the box below, type the name of your case in the box labeled "Name of Case." Be sure to use the full name of the case.

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In the box labeled "Name of Affiant," type your name. Be sure to use your full legal name. For example, if your name is William, type William, not Bill.

Next to your name, check the "Plaintiff" box if you are the Plaintiff in the case or the "Defendant" box if you are the defendant.

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The "Certification" is a notice that the information you provide on the form must be true to the best of your knowledge. Willfully providing false information can result in sanctions or criminal charges against you. three ways to write the range in which the amount in demand falls. The three ways are: 1) "is fifteen thousand dollars or more..."; 2) "is two thousand five hundred dollars or more but is less than fifteen thousand dollars..."; 3) "is less than two thousand five hundred dollars..." Use the range in which the dollar amount for which you are asking falls. For example, if you are asking for \$5,000.00 dollars write "is two thousand five hundred dollars or more but less than fifteen thousand dollars."

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In section Roman numeral 1, the amounts you provide for income are calculated using money received for at least 13 weeks. If your calculations are based on less than 13 weeks or you have no income, please explain why on the line provided.

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On the next line, the form asks on what basis are you paid – weekly, bi-weekly (or every other week), monthly, semi-monthly (or twice a month), or annually (once a year). Check the box before the basis on which you are paid.

Since the form calculates using weekly pay, below this line are instructions on how to multiply and/or divide your pay to determine your weekly pay for filling in the rest of the form.

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In the section labeled “Employer(s) and Address(es),” enter the name of your employer and address on the line labeled “Job number 1.” Check the appropriate box to indicate if you receive a salary or wage. Enter your weekly base salary or wage received on the line provided. For example, if you earn \$250.00 a week as your base wage enter “250” on the line. If you have more than one job, enter the names and addresses of your other employers and your weekly base salary or wage on the lines labeled “Job number 2” and “Job number 3.” Total up all weekly base pays from all jobs. Enter this total on the line “Total of base pay from salary and wages of all jobs.”

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For b through p, you will enter other weekly income from the source listed. For example, if you receive overtime, enter your weekly income from overtime on the line provided following “(b) Overtime.” If you do not receive income from a listed source, skip that line.

Once you have completed filling in all appropriate lines add up the amounts you entered in lines b through p and on the line “Total of base pay from salary and wages of all jobs” to get a total weekly income. Enter this total on line q, “Total Gross Weekly Income/Monies and Benefits from All Sources.”

In the line below, you are asked to enter how many hours a week you work. In the final line of part 1 of section 1, you are asked to enter your “Gross Yearly Income From Prior Tax Year.” This number should equal the total you have from line q multiplied by 52.

Immediately below list and explain any other sources of income or support you receive.

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In part 2 of section 1, Mandatory Deductions,” for numbers 1 through 7 you will enter your average weekly deductions such as income tax, social security, health insurance and other money deducted from your pay. Again, if your deductions are not weekly, calculate the weekly amount by multiplying or dividing as needed.

On line 8, add up all the deductions and enter the “Total Mandatory Deductions.”

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For part 3 of section 1, you will subtract your “Total Mandatory Deductions,” line 8 in part 2, from your “Total Gross Weekly Income/Monies and Benefits from All Sources,” line q in part 1. Enter the total of this subtraction on the line provided. This is your Net Weekly Income.

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For section Roman numeral II of the form you will need to add up your weekly expenses. Weekly expenses are the specific costs you have for items necessary for living, such as rent, utilities, groceries and clothing costs. Do not include things such as credit card payments or other loans not covered in this section. Those types of expenses will be entered later under the “Liabilities” section. Again, you will need to enter your expenses on a weekly basis, so if an expense is not weekly you will need to calculate what it would be if it were weekly. For example, if you pay rent on a monthly basis, multiply your monthly rent by 12, to get the yearly cost for rent, then divide that number by 52, to get the weekly cost for rent. Instructions on how to multiply and/or divide your expenses to determine your weekly expenses are provided on the form.

For the rest of section Roman numeral II, calculate and enter your weekly expense for each of the expenses listed on the form. If you do not have an expense that is listed, leave the line blank. If you have an expense and you are not paying it or someone else is paying it, check the box immediately before the amount of the expense.

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For expense(s) you have that are not listed on the form, enter what they are on the line labeled “Other” and enter the total weekly amount for the expense(s). These could include condo fees, pet expenses or religious donations.

Add up all the expenses you have indicated in this section. At the very end of section II, on the line labeled “Total Weekly Expenses Not Deducted From Pay,” enter this total on the line provided.

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Section Roman numeral III is labeled “Liabilities” and includes all debts that were not included in section II “Weekly Expenses Not Deducted From Pay.” These types of debts can include credit cards, store cards, and installment plan purchases. In the boxes provided, enter the name of the creditor and the type of debt owed. Check the box to indicate if this is a debt that is yours alone or a joint debt with your spouse or another person. In the box for the column labeled “Balance Due,” enter the amount left on the debt. In the next column, labeled “Date Debt Incurred/Revolving,” enter the date the debt began. In the last column calculate the weekly payment on the debt. Again, if the debt is not paid weekly, calculate the yearly cost and divide by 52.

In the line labeled “A. Total Liabilities,” add up all the amounts in the Balance Due column and enter it in the box on this line.

In the line labeled “B. Total Weekly Liabilities Expenses,” add up all the expenses in the “Weekly Payment” column and enter in the box on this line.

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Section Roman numeral IV of the form is labeled Assets. This section of the form asks you to list your assets and calculate their value. It is divided into 8 parts labeled A through H. You will need to fill out the information for each part. If you do not have an asset indicated by the part title, such as Part G – “Business Interest/Self-Employment,” you can skip that part.

Part A is for Real Estate assets. This can include your primary home, a vacation home or other real property you own. In the line provided, enter the address of the property and check the appropriate box to indicate if it is owned by you alone (S), jointly with your spouse (JTS) or jointly with another person (JTO). Enter the “fair market value” of the property in column a. In column b enter the current principal

balance of the mortgage. In column c enter any home equity loan credits or other liens against the property. Enter the equity available for the property. To calculate this, add columns b and c together, then subtract column a from that total. In the last column, labeled e, enter the value of your share of the property.

Add up all values in column e and enter the total in the box on the line labeled "Total Net Value of Real Estate."

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Part B is labeled Motor Vehicles. On line 1, in the first column labeled "Year," enter the year your car was made. In the columns labeled "Make" and "Model," enter both the make and model of your car. Check the appropriate box to indicate if the car is owned by you alone (S), jointly with your spouse (JTS) or jointly with another person (JTO). Enter the market value of your car in column a, "Value." In column b, "Loan Balance," enter how much money you still owe on a car loan if you have one. Column c is labeled "Equity." If you have a car loan, subtract the amount in column b from column a to determine the car's equity and enter that amount in column c. If you do not have a car loan, enter the amount from column a into column c. In the last column, labeled d "Value of Your Interest," enter the value of your share of the car. If you own more than one car, enter the same information for your other car(s) in the lines following.

Add up all the values in column e and enter the total in the box on the line labeled "Total Net Value of Motor Vehicles."

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Part C is labeled Bank Accounts. This area is for your bank accounts, do not include accounts that are in your children's name(s), they will be entered in another section. For all checking accounts, enter the name of the bank, credit union or financial institution that holds the account. In the next column labeled Account Number, enter the last 4 digits only of the account number. For your own protection - do not provide the entire account number. Check the appropriate box to indicate if the account is held by you alone (S), jointly with your spouse (JTS) or jointly with another person (JTO). In the column labeled "Current Balance/Value," enter the current balance or cash value of the account. In the last column, labeled "Value of Your Interest," enter the value of your share of the account. If you have more than one account, enter the same information for your other account(s) in the lines following.

Fill in all information for savings and other types of accounts in the lines provided. Add up all the values in the column labeled "Value of Your Interest" and enter the total in the box on the line labeled "Total Net Value of Bank Accounts."

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Part D is Labeled Stocks, Bonds, Mutual Funds. Here is where you will enter the information for any accounts of this type. Enter the name of the company holding the account in the first column labeled "Company." In the next column labeled "Account Number," enter the last 4 digits only of the account number. Again, for your own protection do not enter the entire account number. In the column labeled "Listed Beneficiary," list the individual(s) who are the beneficiaries of the account. In the last column labeled "Current Balance Value," enter the current cash value of the account.

Fill in all information for other accounts of this type in the lines provided. Add up all the values in the column labeled "Current Balance/Value" and enter the total in the box on the line labeled "Total Net Value of Stocks, Bonds, Mutual Funds."

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Part E is where you will enter information regarding life and disability insurance policies. Do not include insurance policies that cover your children. In the first column labeled "Name of Insured," enter the name of the individual(s) covered by the policy. Check the appropriate box to indicate if it is a life or disability insurance policy. In the column labeled "Company," enter the name of the insurance company that holds the policy. In the column labeled "Account Number," enter the last 4 digits only of the policy account number. Remember, for your own protection do not enter the entire policy account number. In the next column labeled "Listed Beneficiary," list the individual(s) who are the beneficiaries of the policy. In the last column labeled "Current Balance Value," enter the current cash value of the policy.

Fill in all information for other insurance policies in the lines provided. Add up all the values in the column labeled "Current Balance/Value" and enter the total in the box on the line labeled "Total Net Value of Insurance."

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Part F of this section deals with Retirement Plans. In the first column of the first line, enter the type of plan, such as a pension, 401K or IRA. In the second column enter the name of the bank, company or institution that holds the account. In the column labeled "Account Number," enter the last 4 digits only of the account number. Once again, do not enter the entire policy account number. In the column labeled "Listed Beneficiary," list the individual(s) who are the beneficiaries of the account. Next, indicate by checking the correct box if the account is currently receiving payments or not. In the last column labeled "Current Balance Value," enter the current cash value of the account.

Fill in all information for other retirement type accounts in the lines provided. Add up all the values in the column labeled "Current Balance/Value" and enter the total in the box on the line labeled "Total Net Value of Retirement Plans."

In part G, "Business Interest/Self-Employment." You only need to enter information in this part if you own all or part of a business or if you are self-employed. If neither of these two factors apply to you, you can skip this part.

In the first column labeled "Name of Business," enter the name of the business owned or that you run. In the next column, "Percent Owned," enter what percent of the business is yours. If you are self-employed you own 100%. In the final column enter the value of the business. On the bottom line, labeled "Total Net Value of Business Interest/Self-Employment," enter the value of the business.

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Part H is labeled "Other Assets." This is where you will enter any other property or financial assets you have that were not entered in the prior parts of this section. These could include money market accounts, collections of value, such as art, coins, jewelry or equipment. In the first column, identify what the asset is. In the column labeled "Current Balance/Value," enter the value of the asset. The other two columns on the line are for indicating another asset and value. In the box at the bottom labeled "Total Net Value of Other Assets," enter the total of all amounts entered in the boxes labeled "Current Balance/Value."

Part I is labeled "Total Net Value All Assets" and this is where you will enter the total amount of all assets by entering the total of items from parts A through H.

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Section Roman numeral V of the form deals with any financial assets of your child or children, should you have any. These assets can include savings accounts, college funds, trusts and insurance

policies. In the first column, enter the bank or institution holding the account. In the next column labeled "Account Number," enter the last 4 digits only of the policy account number. For your own and your child's or children's protection do not enter the entire policy account number. In the column labeled "Listed Beneficiary," list the individual(s) who are to benefit from the account. In the column labeled "Person Who Controls the Account," enter the name(s) of the person(s) who controls the account on behalf of the child or children. In the last column labeled "Current Balance Value," enter the current cash value of the account. Do the same in the provided lines for other assets of your child or children.

In the line labeled "Total Net Value of Child(ren)'s Assets," enter the total amount for all of the "Current Balance/Value" added together.

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Section Roman numeral VI of the form is for Health related assets, such as medical or dental insurance plans. In the column labeled "Company," enter the name of the company which holds the policy. In the next column labeled "Name of Insured Person(s) Covered by the Policy," you will enter the name(s) of all people covered under the policy. This could include your spouse and child or children if it is a family policy. Below the line for entering the policy information, the form asks if you or anyone in your family is covered under the state's HUSKY Health Insurance Coverage. Check the appropriate box before either "Yes," "No," or "I Don't Know." If any family member is covered, enter his or her name(s) on the lines provided.

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Please review all the information you have provided on the form for sections Roman numeral I through VI and make sure it is complete and accurate. The form now asks you to disclose any other income, liabilities, or financial assets that were not included in any other section of the form. Use the lines provided to list any such information. You are required to disclose anything else that should be considered by the court when making determinations regarding support or alimony. You will be swearing under oath to the completeness of the information provided and that you are aware that not disclosing information could result in court sanctions or criminal charges.

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The section of the form labeled "Summary" asks you to reenter the information provided earlier on the form. Enter the amount, in the space provided, for each of the following. For "Total Net Weekly Income," reenter the amount you entered in part 3 of section I, "Net Weekly Income." For "Total Weekly Expenses and Liabilities," add together the totals in "Total Weekly Expenses Not Deducted from Pay" and "Total Weekly Liabilities Expenses" in Sections II and III. For "Total Cash Value of Assets," reenter the amount found in part I of section IV, "Total Net Value All Assets." For "Total Liabilities," reenter the amount from part A in Section II, "Total Liabilities."

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The Certification is where you are swearing to that fact that the information you provided on the form is complete and true to the best of your knowledge. You are also acknowledging that you are aware that hiding or lying about any of your financial information on purpose can result in the court sanctioning you or in criminal charges being filed against you. Enter your full legal name on the line provided and check the box to indicate if you are the plaintiff or defendant. You will also enter your address and telephone number on the provided lines.

If you complete this Financial Affidavit on the computer, print the form by pressing the "Print" button at the bottom of the page.

**Do not sign and date the form at this time.** Take the form to a Notary and sign and date it in front of the Notary, who will then sign the form indicating they witnessed your signature. Notaries can be found in the Judicial Branch Court Service Centers, Town/City Clerks' Offices or at most banks. You can also take the unsigned form to the Clerk's Office and sign and date the form in front of the Clerk who will then sign the form indicating they witnessed your signature. Make copies to send to the other party or parties and one to keep yourself. File the original signed form with the Clerk's Office.

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**More Help.**

If you need procedural help or further assistance with filling in the Financial Affidavit form or any court form, please visit a Court Service Center.

If you need further information on handling your case, please visit a Judicial Branch Law Library.

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This is the end of our demonstration. For more information please visit a Judicial Branch Law Library, a Court Service Center, or the Judicial Branch website.