

# **Financial Statement for a financial remedy (other than a financial order or financial relief after an overseas divorce or dissolution etc) in the family court or High Court**

Name of court	Case No.
Name of Applicant	
Name of Respondent	

(please tick the appropriate boxes)

This is the Financial Statement of the

- Applicant  
 Respondent

in this application

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This form should only be completed if you are applying for a financial remedy other than a financial order or financial relief after an overseas divorce or dissolution etc. in the family court or high court.

**If you are applying for a financial order (which can only be applied for as part of a divorce, dissolution, annulment or (judicial) separation in the High Court or family court in England and Wales) or for financial relief after an overseas divorce or dissolution etc. you should complete Form E.**

If you are applying for a variation of an order for a financial remedy you should complete Form E2.

Please fill in this form fully and accurately. Where any box is not applicable, write 'N/A'.

You have a duty to the court to give a full, frank and clear disclosure of all your financial and other relevant circumstances.

A failure to give full and accurate disclosure may result in any order the court makes being set aside.

If you are found to have been deliberately untruthful, criminal proceedings may be brought against you for fraud under the Fraud Act 2006.

The information given in this form must be confirmed by a statement of truth. **Proceedings for contempt of court may be brought against a person who makes or causes to be made, a false statement in a document verified by a statement of truth.**

You must attach documents to the form where they are specifically sought and you may attach other documents where it is necessary to explain or clarify any of the information that you give.

If there is not enough room on the form for any particular piece of information, you may continue on an attached sheet of paper.

If you are in doubt about how to complete any part of this form you should seek legal advice.

This statement is filed by

Name and address of solicitor	
Solicitor's fee account no.	

Name and address of solicitor	
Solicitor's fee account no.	

## 1. General information

- 1.1 Full name
- 1.2 Date of birth  /  /     1.2A Occupation
- 1.3 Are you married/in a civil partnership?  Yes  No
- 1.4 If you are not married or in a civil partnership  Yes  No  
are you living with a partner?
- 1.5 Your present residence and the occupants of it and on what terms you occupy it (e.g. tenant, owner-occupier).

Address	Occupants	Terms of occupation

- 1.6 Children living with you

Names	Date of birth
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- 1.7 Children not living with you

Names	Date of birth
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Amount of any maintenance being paid	£

1.8 Other dependents

(Give details – including whether you have these responsibilities on a permanent basis).

Names	Details

1.9 Details of the state of health of yourself and the children if you think this should be taken into account.

Yourself	Children

1.10 Details of the present and proposed future educational arrangements for the children.

Present arrangements	Future arrangements

1.11 Details of any child support maintenance calculation or any maintenance order or agreement made in respect of any children of the family. If no calculation, order or agreement has been made, give an estimate of the liability of the non-resident parent in respect of the children of the family under the Child Support Act 1991.

1.12 Details of any other court cases between you and your spouse/civil partner, whether in relation to money, property, children or anything else.

Case No.	Court	Type of proceedings

## 2. Employment

- 2.1 I am  employed (complete 2.2)  
 self employed (complete 2.3)  
 unemployed (go to 3.)  
 a pensioner (go to 3.)

## 2.2 Details of earned income from employment. Complete one page for each employment.

Documentation required for attachment to this section:

- a) P60 for the last financial year (you should have received this from your employer shortly after the last 5th April)
- b) Your last three payslips
- c) Your last Form P11D if you have been issued with one

Name and address of your employer

Job title and brief details of the type of work you do

Hours worked per week in this employment

How long have you been with this employer?

Explain the basis of your income i.e. state whether it is based on an annual salary or an hourly rate of pay and whether it includes commissions or bonuses

Gross income for the last financial year as shown on your P60

Net income for the last financial year i.e. gross income less income tax and national insurance

Average net income for the last three months i.e. total income less income tax and national insurance divided by three

Briefly explain any other entries on the attached payslips other than basic income, income tax and national insurance

If the payslips attached for the last three months are not an accurate reflection of your normal income briefly explain why

Details and value of any bonuses or other occasional payments that you receive from this employment not otherwise already shown, including the basis upon which they are paid

Details and value of any benefits in kind, perks or other remuneration received from this employer in the last year (e.g. provision of a car, payment of travel, accommodation, meal expenses, etc.)

Your estimate of your net income from this employment for the next 12 months.

Estimated TOTAL of ALL net earned income from employment for the next 12 months: Total A

£

### **2.3 Income from self-employment or partnership**

Complete this section giving details of your income from your business. Complete one page for each business.

Documentation required for attachment to this section:

- a) Copies of your business accounts for the last 2 years
- b) A copy of your last tax assessment or, if that is not available, a letter from your accountant confirming your tax liability
- c) If net income from the last financial year and estimated net income for the next 12 months is significantly different, a copy of management accounts for the period since your last account

Name of the business	
Date to which your last accounts were completed	
Your share of gross business profit from the last completed accounts	
Income tax and national insurance payable on your share of gross business profit above	
Net income for that year (using the two figures directly above, gross business profit less income tax and national insurance payable)	
Details and value of any benefits in kind, perks or other remuneration received from this business in the last year e.g. provision of a car, payment of travel, accommodation, meal expenses, etc.	
Amount of any regular monthly or other drawings that you take from this business	
If the estimated figure directly below is different from the net income as at the end date of the last completed accounts, briefly explain the reason(s)	
Your estimate of your net annual income for the next 12 months	
Estimated TOTAL of ALL net income from self-employment or partnership for the next 12 months: Total B	£

### 3. Other income

- 3.1 Details of income from investments (e.g. dividends, interest or rental income) received in the last financial year (the year ended last 5th April), and your estimate of your income for the current financial year. Indicate whether the income was paid gross or net of income tax. You are not required to calculate any tax payable that may arise.

Nature of income and the asset from which it derived	Paid gross or net	Income received in the last financial year	Estimated income for the next 12 months
Estimated TOTAL investment income for the next 12 months: Total C			£

- 3.2 Details of all state benefits (including state pension and child benefit) that you are currently receiving.

Name of benefit	Amount paid	Frequency of payment	Estimated income for the next 12 months
Estimated TOTAL benefit income for the next 12 months: Total D			£

- 3.3 Details of any other income not disclosed above.

INCLUDE:

Any source including a Pension (excluding State Pension), and Pension Protection Fund (PPF) compensation

- from which income has been received during the last 12 months (even if it has now ceased)
- from which income is likely to be received during the next 12 months

You are reminded of your obligation to give full disclosure of your financial circumstances.

Nature of income	Paid gross or net	Income received in the last financial year	Estimated income for the next 12 months
Estimated TOTAL other income for the next 12 months: Total E			£

#### 4. Capital

- 4.1 Details of your interest in property, land or buildings. Complete one page for each property you have an interest in.

Documentation required for attachment to this section:

- a) A copy of any valuation of the property obtained within the last six months. If you cannot provide this document, please give your own realistic estimate of the current market value
- b) A recent mortgage statement confirming the sum outstanding on each mortgage

Property name and address

Land Registry title number

Mortgage company name(s) and address(es) and account number(s)

Type of mortgage

Details of who owns the property and the extent of your legal and beneficial interest in it (i.e. state if it is owned by you solely or jointly owned with your spouse/civil partner or with others)

If you consider that the legal ownership as recorded at the Land Registry does not reflect the true position, state why

Current market value of the property

Balance outstanding on any mortgage(s)

If a sale at this stage would result in penalties payable under the mortgage, state amount

Estimate the costs of sale of the property

Total equity in the property (i.e. market value less outstanding mortgage(s), penalties if any and the costs of sale)

TOTAL value of your interest in ALL other property: Total F £

- 4.2 Details of all personal bank, building society and National Savings Accounts that you hold or have held at any time in the last twelve months and which are or were either in your own name or in which you have or have had any interest. This applies whether any such account is in credit or in debit. For joint accounts give your interest and the name of the other account holder. If the account is overdrawn, show a minus figure.

Documentation required for attachment to this section:

Copies of statements for the last 12 months for each account that has been held in the last twelve months, either in your own name or in which you have or have had any interest.

Name of bank or building society, including branch name	Type of account (e.g. current)	Account number	Name of other account holder (if applicable)	Balance at the date of this statement	Total current value of your interest
TOTAL value of your interest in ALL accounts: (G1)					£

- 4.3 Details of all investments, including shares, PEPs, ISAs, TESSAs, National Savings Investments (other than already shown above), bonds, stocks, unit trusts, investment trusts, gilts and other quoted securities that you hold or have an interest in. (Do not include dividend income as this will be dealt with separately later on.)

Documentation required for attachment to this section:

Latest statement or dividend counterfoil relating to each investment.

Name	Type of Investment	Size of holding	Current value	Name of any other account holder (if applicable)	Total current value of your interest
TOTAL value of your interest in ALL holdings: (G2)					£

- 4.4 Details of all life insurance policies including endowment policies that you hold or have an interest in. Include those that do not have a surrender value. Complete one page for each policy.

Documentation required for attachment to this section:

A surrender valuation of each policy that has a surrender value.

Name of company

--

Policy type

--

Policy number

--

If policy is assigned, state in whose favour and amount of charge

--

Name of any other owner and the extent of your interest in the policy

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Maturity date (if applicable)

D	D	/	M	M	/	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---	---

Current surrender value (if applicable)

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If policy includes life insurance, the amount of the insurance and the name of the person whose life is insured

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Total current surrender value of your interest in this policy

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TOTAL value of your interest in ALL policies: (G3)

£

Add together the totals of G1 to G3 to give TOTAL G

£

4.5 Give details of any other assets not listed above.

**INCLUDE** (the following list is not exhaustive):

- Any personal or business assets not yet disclosed
- Any monies owed to you
- Any cash sums held in excess of £500
- Any other personal belonging individually worth more than £500
- Trust interests (including interests under a discretionary trust), stating your estimate of the value of the interest and when it is likely to become realisable. If you say it will never be realisable, or has no value, give your reasons
- Any asset that is likely to be received in the foreseeable future
- Any asset held on your behalf by a third party
- Any asset not disclosed elsewhere on this form even if held outside England and Wales
- You are reminded of your obligation to disclose all your financial assets and interests of ANY nature.

Type of asset	Value	Total NET value of your interest
TOTAL value of ALL your other assets: Total H		£

4.6 Details of any liabilities you have.

**EXCLUDE** liabilities already shown such as:

Mortgages

Any overdrawn bank, building society or National Savings accounts

**INCLUDE:**

Money owed on credit cards and store cards

Bank loans

Hire purchase agreements

List all credit and store cards held including those with a nil or positive balance. Where the liability is not solely your own, give the name(s) of the other account holder(s) and the amount of your share of the liability.

Liability	Name(s) of other account holder(s) (if applicable)	Total liability	Total current value of your interest in the liability
TOTAL value of your interest in ALL liabilities: Total I			£

## 5. Income needs

(Do not include any payments made by other members of the household out of their own income)

- 5.1 I have regular expenses as follows:  
(do not include payments on any arrears)

Amounts are per	
	<input type="checkbox"/> week
	<input type="checkbox"/> month
Mortgage	
Rent	
Council Tax	
Gas	
Electricity	
Water charges	
TV rental/licence	
HP repayments	
Mail order	
Housekeeping, food, school meals	
Travelling expenses	
Children's clothing and pocket money	
Maintenance Payments	
Car Expenses	
Insurance – House	
Insurance – Other (please give details)	
Others	
Total payments:	£

- 5.2 Income needs for children living with you or provided for by you.

INCLUDE:

- Only those income needs that are different to those of your household shown above

Item	Current cost	Estimated future cost
SUB-TOTAL children's income needs:	£	
TOTAL of ALL income needs:	£	

## 6. Financial resources of child(ren)

Income	Property	Other
TOTAL:	TOTAL:	TOTAL:

## 7. Financial Details Summaries

- 7.1 Summary of your estimated income for the next 12 months (Parts 2 to 3).

Description	Reference of the section on this statement	Value
Estimated net total of income from employment	A	
Estimated net total of income from self-employment or partnership	B	
Estimated net total of investment income	C	
Estimated state benefit receipts	D	
Estimated net total of all other income	E	
Estimated TOTAL income for the next 12 months (Totals A to E):		£

- 7.2 Summary of your capital (Part 4).

Description	Reference of the section on this statement	Value
Current value of your interest in property	F	
Current value of personal assets	G	
Current value of all your other assets	H	
Current value of your liabilities	I	
TOTAL value of your assets (Totals F to H minus I):		£

## Statement of Truth

\*delete as appropriate

\*[I believe] [the Applicant/Respondent believes] that the facts stated in this statement are true

\*I am duly authorised by the Applicant/Respondent to sign this statement

and confirm that the information given above is a full, frank, clear and accurate disclosure of my financial and other relevant circumstances.

Print full name

Address for service

Postcode

Name of Applicant's/  
Respondent's  
solicitor's firm

Signed

Dated   /   /

\*(Applicant/Respondent) (Litigation friend)  
\*(Applicant's/Respondent's solicitor)

Position or office held  
(if signing on behalf of  
firm or company)

**Proceedings for contempt of court may be brought against a person who makes or causes to be made, a false statement in a document verified by a statement of truth.**

Address all communications to the Court Manager of the Court and quote the case number.  
If you do not quote this number, your correspondence may be returned.

## Schedule of Documents to accompany Form E1

The following list shows the documents you must attach to your Form E1 if applicable. You may attach other documents where it is necessary to explain or clarify any of the information that you give in the Form E1.

Form E1 paragraph	Document	Please tick		
		Attached	Not applicable	To follow
2.2	<b>Employment income:</b> your P60 for the last financial year in respect of each employment that you have.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2	<b>Employment income:</b> your last three payslips in respect of each employment that you have.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2	<b>Employment income:</b> your last form P11D if you have been issued with one.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.3	<b>Self-employment or partnership income:</b> a copy of your last tax assessment or if that is not available, a letter from your accountant confirming your tax liability and business accounts for the last 2 years.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.3	<b>Self-employment or partnership income:</b> if net income from the last financial year and the estimated income for the next twelve months is significantly different, a copy of the management accounts for the period since your last accounts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.1	a copy of any valuation relating to each other property disclosed that has been obtained in the last six months.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.1	a recent mortgage statement in respect of each mortgage on each other property disclosed confirming the amount outstanding.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.2	<b>Personal bank, building society and National Savings accounts:</b> copies of statements for the last 12 months for each account that has been held in the last twelve months, either in your own name or in which you have or have had any interest.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.3	<b>Other investments:</b> the latest statement or dividend counterfoil relating to each investment as disclosed in paragraph 4.3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.4	<b>Life insurance (including endowment) policies:</b> a surrender valuation for each policy that has a surrender value as disclosed under paragraph 4.4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State relevant Form E1 paragraph	Description of other documents attached:			