

*Commonwealth of Massachusetts*  
Bristol County Probate & Family Court



**Gina L. DeRossi**  
*Register of Probate*

## **FINANCIAL STATEMENT**

### **Short Form Instructions**

Use these instructions if:

- ✓ Your income is less than \$75,000.00 per year.
- ✓ You are a party to a case where financial relief is requested by you or the other party.

**STEP 1:**     **COMPLETE THE FORM:** Fill out the form completely using permanent black ink. You may also complete and type the form on line at [www.bristolcountyprobate.com](http://www.bristolcountyprobate.com) Be sure to put your case's correct docket number on the top right hand corner of your form, where indicated.

- ➔ Fill out the form completely using black ink.
- ➔ You **MUST** use the official pink Financial Statement court form available at the Registry or any Probate Court location. If you obtain the form on-line, you must print it on pink paper.
- ➔ Read the form carefully and fill in the requested information.
- ➔ If additional space is needed for any answer, an attached sheet may be filed.
- ➔ Fill in every line. If you have no information to put in a line, write "NONE".
- ➔ You will need information about your current salary, for example, a recent pay stub or W-2.
- ➔ You will also need information about your expenses, debts and assets.

**Section 1:    Personal Information:** Fill in your name, address, employment, health coverage and other personal identifying information requested. You may identify your Social Security Number using only the last 4 digits. If you are unemployed, please state that next to "occupation".

**Section 2:    Gross Weekly Income/Receipts From All Sources:** Fill in your income. If you are paid monthly, divide your monthly income by 4.3. If you are paid every 2 weeks, divide your income by 2. If you are paid twice a month, divide your income by 2.15. If you are self employed, complete and attach form "Schedule A". If you receive rental income, complete and attach form "Schedule B". These Schedules are available at the Registry

of Probate or at [www.bristolcountyprobate.com](http://www.bristolcountyprobate.com).

**Section 3: Itemized Deductions From Gross Income:** Using your pay stub, if applicable, fill in deductions from your income. Use weekly amounts.

**Section 4: Adjusted Net Weekly Income:** Subtract the total deductions (3(f)) from the total income (2(r)).

**Section 5: Other Deductions From Salary:** Fill in any other items deducted from your wages.

**Section 6: New Weekly Income:** Subtract 5(3) from 4.

**Section 7: Gross Yearly Income From Prior Year:** Fill in your total gross income from last year and attach a copy of last year's w-2 form and any 1099 or Schedule C Tax forms showing your income.

**Section 8: Weekly Expenses:** If you know the monthly amount of these expenses, divide the amount by 4.3 to get the weekly amount. Expenses are only to be reported using WEEKLY totals.

**Section 9: Counsel Fees:** If you have an attorney representing you, you must complete this section.

**Section 10: Assets:** In the lines provided, fill in the estimated value of real estate, bank accounts, pensions, life insurance, motor vehicles, and any other items of value you own, such as stocks and bonds. For savings, checking and money market accounts, and certificates of Deposit (CDs), list the name of the bank and the account number.

**Section 11: Liabilities:** In the chart provided, list all of your debts. First list the creditor, that is who you owe the money to, then the kind of debt, the date you borrowed the money, the total amount due, and the weekly payment you make. Debts can be credit cards, car loans, outstanding medical bills, etc.

**STEP 2:** **SIGN AND DATE FORM:** You must sign and date the form before filing. This document is signed under the penalties of perjury.

**STEP 3:** **MAKE COPIES:** Make a copy of the completed form. Keep a copy for yourself. File the original form.

**Please be advised that the information in this pamphlet is provided as a service of the Bristol County Probate & Family Court Registry and does not constitute legal advice which can only be given to you by an attorney.**

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