# Family Dispute Resolution Service (FDRS) FDRS File no. Enter C reference here

# Financial information form: property mediation

# Your lawyer must go through this form with you before mediation, but you can complete it yourself.

# If you do this yourself, please email it to your lawyer with any attached supporting documents (such as bank statements or pay slips), so it can be shared with the other party before mediation.

Your lawyer can return your completed form and any supporting documents to:

**VLA Family Dispute Resolution Service**

E-mail: fdrs@vla.vic.gov.au (scan and email) Post: Victoria Legal Aid

GPO Box 4380, Melbourne 3001

**In financial disputes, under family law each person must provide full details of their financial situation (assets, income and debts) to the other person. If they don’t, a court can order them to do this. This is called a requirement of ‘full and frank disclosure’ – we use this form to help people meet this requirement, to be used in their mediation, with legal advice**

## How will the information be used?

Before the mediation date, the lawyers will exchange financial information, including this form and any other financial documents provided that prove what is in the form. The more financial information the parties disclose, the better the chance of settlement. To find out more information about how we can use this information read the back of this form.

**What if I am not sure about the details of the assets and liabilities?**

If you don’t know the exact amount, put an estimate (write **E** next to the amount) or write not known (**N/K**).

## Summary of client information

**Name and age**

Your name: …………………… Your date of birth and age: ……………………

Other party’s name: …………………… Other party’s date of birth and age: ……………………

## Relationship details

[ ]  Married [ ]  De facto [ ]  Other

Duration of cohabitation/marriage: ……………………………………………..……

Date of separation: ……………………………………………..……

## Children of the relationship (if applicable)

Name: …………………… Date of birth: ……………………

Name: …………………… Date of birth: ……………………

Name: …………………… Date of birth: ……………………

# Section 1 – Assets and liabilities

**!** *Please include full details and attach valuation or proof of assets. If you need more space, add extra pages*

 **Property 1 Address:**

**Property 2 Address:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Name on Title** (You, other party or jointly owned?) | **Purchase date** | **Purchase price** | **Your contribution to the deposit (in $)** | **Other party’s contribution to the deposit (in $)** |
| **Property 1** |  |  |  |  |  |
| **Property 2** |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Name on Mortgage** (You, other party or jointly owned?) | **Financial Institution name** | **Balance of mortgage** | **Estimated current value** | **Valuation or appraisals method** |
| **Property 1** |  |  |  |  | Choose an item. |
| **Property 2** |  |  |  |  | Choose an item. |

| Asset/what owned  | Who owns it | $ Value (you) | $ Value (other) |
| --- | --- | --- | --- |
| Item description (car, bank account) | You, other party or jointly owned? | Your estimate | Other party’s estimate(if known) |
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|  |  |  |  |
| **TOTAL** |  | $ Enter total  | $ Enter total  |

|  |  |  |  |
| --- | --- | --- | --- |
| Superannuation | Who owns it | $ Value (you) | $ Value (other) |
| Item description | You, other party or jointly owned? | Your estimate | Other party’s estimate(if known) |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **TOTAL** |  | $ Enter total  | $ Enter total  |
| Other financial resources (fund, business) | Who owns it | $ Value (you) | $ Value (other) |
| Item description | You, other party or jointly owned? | Your estimate | Other party’s estimate (if known) |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **TOTAL ASSETS (WHAT IS CURRENTLY OWNED)**  |  | $ Enter total  | $ Enter total  |

**!** *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*

| **Liability/debt you owe (and type)** |  |  |  |
| --- | --- | --- | --- |
| Item description (loans, credit card debts, buy now/pay later) | **Name on the account** | **Loan start date** | $ Value  |
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|  |  |  |  |
|  |  |  |  |
| TOTAL |  |  | $ Enter total |
| TOTAL DEBTS (WHAT IS CURRENTLY OWED)  |  |  | $ Enter total  |

|  |
| --- |
| Other financial interests or information needed |
| Further information needed (for example, you believe an item requires a valuation)? |
|  |
| Do you have any financial interest in a trust, or a deceased estate? Do you believe the other party has? |
|  |
| Do you expect to receive a financial gain, now or in the future? For example, a compensation claim, or inheritance, redundancy payment. |
|  |

# Section 2 – Contributions

|  |
| --- |
| Financial contributions: assets and liabilities |
| Tell us about the assets, or liabilities you brought into the relationship (house, car, super) |
|  |

|  |  |
| --- | --- |
| Financial contributions: employment | $ Amount |
| Employer’s name | Job description | Full-time, part-time, casual, regularity | Salary per week (gross) |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Financial contributions: further employment information** |
| Tell us about your employment during the relationship (full-time, part-time, casual, regularity) |
|  |
| Other funds received or assets acquired in the last 12 months or pre-separation |
| (For example, from the sale of property, a car or a superannuation withdrawal, and items bought) |
| Item sold/disposed of | How was it sold/disposed of? | $ Amount received |
|  |  |  |
|  |  |  |
|  |  |  |
| TOTAL |  | $ Enter amount  |
| Item purchased/acquired | How was it purchased/acquired? | $ Amount/value  |
|  |  |  |
|  |  |  |
|  |  |  |
| TOTAL |  | $ Enter amount  |

|  |
| --- |
| Non-financial contributions made during the relationship and since separation  |
| Non-financial contribution  | Yes (if yes, check) | No (if no, check) |
| Homemaker |[ ] [ ]
| Input in improvements to property |[ ] [ ]
| Other (provide details below) |[ ] [ ]
|  |
| Parenting contributions | Yes (if yes, check) | No (if no, check) |
| Caring for children of the relationship |[ ] [ ]
| Using your income for food/bills/household |[ ] [ ]
| Household tasks (in and out of the home) |[ ] [ ]
| Caring for other children |[ ] [ ]
| Caring for step - children |[ ] [ ]
| Caring for other parties |[ ] [ ]
| Other (provide details) |[ ] [ ]

|  |
| --- |
| Medical condition or issues that affect your ability to work in paid employment  |
| Medical condition | Impact on your health | Is it ongoing? (yes/no) |
|  |  |  |
|  |  |  |

|  |
| --- |
| Contributions to the assets after separation |
| Details | Yes (enter amount you paid) | No (give more details) |
| Paying the mortgage |  |  |
| Paying other bills (Council rates, insurance) |  |  |
| Caring for children (days and duration) |  |  |

# Section 3 – Current Employment

|  |
| --- |
| Your occupation |
| Describe your occupation, profession, work, study |
|  |
| What type of employment do you have? (check box) |
| [ ]  Fulltime [ ]  Part-time [ ]  Casual [ ]  Unemployed [ ]  Student |

|  |  |
| --- | --- |
| Current income and support | $ Amount |
| Type of income/support | Details | Weekly income after tax |
| Wage | (Employer’s name) |  |
| Government benefit | (Which benefit) |  |
| Child support | (Paying or receiving) |  |
| Shares/investment income | (Name of shares, fund) |  |
| Work benefit  | (For example, car or phone) |  |
| Any other income | (For example, rental/board received) |  |
| **TOTAL** |  | $ Enter amount  |

|  |
| --- |
| Other relevant financial information |
| Tell us about any other financial information that may be relevant for this mediation |
|  |

## Acknowledgement

I, (full name)

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

Your signature: Date: / /

**Please tick who is signing:**  [ ]  I am a party [ ]  I am a lawyer

## Checklist: before you send in this financial statement, have you:

[ ]  Answered all relevant questions as well as you can?

[ ]  Attached copies of all financial documents relevant to your case (like bank and other statements)?

[ ]  Attached copies of all other/court/legal documents that may be relevant (such as a parenting agreement)?

Send your completed form and any supporting documents to:

**VLA Family Dispute Resolution Service**

E-mail: fdrs@vla.vic.gov.au (scan and email) Post: Victoria Legal Aid

GPO Box 4380, Melbourne 3001

## About this form

### Who the form is for

If you are using Victoria Legal Aid Family Dispute Resolution Service (FDRS) to help you sort out a financial settlement with your former partner, you must fill in this form OR provide a recently completed Federal Circuit and Family Court of Australia [financial statement (form)](https://www.fcfcoa.gov.au/fl/forms/financial-statement) before property mediation.

**! Family law requires full and frank disclosure of financial information. We cannot offer mediation without financial information being provided.**

### How the information in this form is used

* To help us deliver a dispute resolution service to you, including by sharing this 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), in exchange for their form and information. The FDRS Case Manager will keep a copy on our file, and share it with the mediator, if your case is booked for a conference.

### Confidentiality and privacy

* 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 *Privacy and Data Protection Act 2014* (Vic) 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.

## More information

Get legal advice about your specific financial situation. For more information about our dispute resolution process, please get in touch.

To contact VLA Family Dispute Resolution Service:

Call 1800 136 832 (toll free)

Email fdrs@vla.vic.gov.au

[www.legalaid.vic.gov.au/fdrs](http://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.

\*If you do not have a lawyer, contact Victoria Legal Aid’s Legal Help on 1300 792 387 or visit [www.legalaid.vic.gov.au/speak-to-us](https://aus01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.legalaid.vic.gov.au%2Fspeak-to-us&data=05%7C02%7CSam.Lawry%40vla.vic.gov.au%7C1134c56e50ce4632d8d708dd8c5f433d%7Cf6bec780cd1349ce84c75d7d94821879%7C1%7C0%7C638821062963409645%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=UNOYijFMSqa99g%2B0n8Oocfq5lmDU1IgdDLV1le%2Fv7Jg%3D&reserved=0)

# ! *You can add extra pages, if you require more space to provide financial information*