

PSA WORKSHEET

Spouse A is: _____ Spouse B is: _____

List all debts and assets regardless if they are solely or jointly owned

This information is provided by: _____

Marital Home: (See tax assessment, market analysis, appraisal to assist w/valuation) YES NO **RECIPIENT**

			A	B	TBD
ADDRESS					
LEGAL DESCRIP.					
MORTGAGE					
2 nd MORTGAGE			VALUE		
VALUE			TBD		

Other Real Estate: (rental, farm, condo, cabin, etc) YES NO

			A	B	TBD
ADDRESS					
LEGAL DESCRIP.					
MORTGAGE			VALUE		
VALUE			TBD		

			A	B	TBD
ADDRESS					
LEGAL DESCRIP.					
MORTGAGE			VALUE		
VALUE			TBD		

Vehicles: (car, motorcycle, RV, boat, trailer, ATV, etc.-use NADA.com or KBB.com for value) YES NO

				A	B	TBD
YEAR/MAKE/MODEL		VIN				
VALUE	\$	LOAN				

				A	B	TBD
YEAR/MAKE/MODEL		VIN				
VALUE	\$	LOAN				

				A	B	TBD
YEAR/MAKE/MODEL		VIN				
VALUE	\$	LOAN				

				A	B	TBD
YEAR/MAKE/MODEL		VIN				
VALUE	\$	LOAN				

Note: Unless you and your spouse agree on valuations or debt amounts, bring validation of debts/assets to share in mediation. (bank statements, retirement account statements, bills, printout of car value, etc.)

Bank Accounts: (checking, savings, CDs, child's, safety deposit boxes, etc.) YES NO

						A	B	TBD
BANK		NAME(S)						
TYPE		ACCT. #	XXX-____	BALANCE	\$			
						A	B	TBD
BANK		NAME(S)						
TYPE		ACCT. #	XXX-____	TYPE				
						A	B	TBD
BANK		NAME(S)						
TYPE		ACCT. #	XXX-____	TYPE				
						A	B	TBD
BANK		NAME(S)						
TYPE		ACCT. #	XXX-____	TYPE				
						A	B	TBD
BANK		NAME(S)						
TYPE		ACCT. #	XXX-____	TYPE				

Retirement Accts: (401(k), profit sharing, IRA, deferred comp., military, pension, etc.) YES NO

						A	B	TBD
COMPANY		OWNER						
TYPE		ACCT. #	XXX-____	BALANCE	\$			
						A	B	TBD
COMPANY		OWNER						
TYPE		ACCT. #	XXX-____	BALANCE	\$			
						A	B	TBD
COMPANY		OWNER						
TYPE		ACCT. #	XXX-____	BALANCE	\$			
						A	B	TBD
COMPANY		OWNER						
TYPE		ACCT. #	XXX-____	BALANCE	\$			

Stocks &/or options, cash, HSA, insurance, other: YES NO

						A	B	TBD
COMPANY		OWNER						
LOAN		POLICY #		VALUE	\$			
						A	B	TBD
COMPANY		OWNER						
LOAN		POLICY #		VALUE	\$			
						A	B	TBD
COMPANY		OWNER						
LOAN		POLICY #		VALUE	\$			

Business Ownership: YES NO

					A	B	TBD
COMPANY			OWNERS				
TYPE OF OWNERSHIP			VALUE	\$			

School loans: YES NO

						A	B	TBD
COMPANY		NAME(S)						
TYPE		ACCT. #	XXX-____	BALANCE:	\$			
						A	B	TBD
COMPANY		NAME(S)						
TYPE		ACCT. #	XXX-____	BALANCE:	\$			
						A	B	TBD
COMPANY		NAME(S)						
TYPE		ACCT. #	XXX-____	BALANCE:	\$			

Debts: (credit cards, medical bills, utility bills, home owner fees, etc.) YES NO

						A	B	TBD
COMPANY		NAME(S)						
TYPE		ACCT. #	XXX-____	BALANCE:	\$			
						A	B	TBD
COMPANY		NAME(S)						
TYPE		ACCT. #	XXX-____	BALANCE:	\$			
						A	B	TBD
COMPANY		NAME(S)						
TYPE		ACCT. #	XXX-____	BALANCE:	\$			
						A	B	TBD

COMPANY		NAME(S)							
TYPE		ACCT. #	XXX-____	BALANCE:	\$				
							A	B	TBD
COMPANY		NAME(S)							
TYPE		ACCT. #	XXX-____	BALANCE:	\$				
							A	B	TBD
COMPANY		NAME(S)							
TYPE		ACCT. #	XXX-____	BALANCE:	\$				

Non-marital assets, gifts, or inheritance received during marriage: YES NO

DESCRIPTION				A	B	TBD
	VALUE					
	VALUE					
	VALUE					

Pre-marital debts/assets: (items brought into the marriage) YES NO

DESCRIPTION				A	B	TBD
	VALUE					
	VALUE					
	VALUE					

HOUSEHOLD/PERSONAL ITEMS:

Have you divided your household items to your satisfaction or believe you can do so? YES NO

If no, what items are in dispute? _____

MATTERS IN DISPUTE:

Are there matters in dispute that you need to discuss? YES NO

If so, what are they? _____

