Andalman&Flynn
ATTORNEYS AT LAW

FACT SHEET ON PROPERTY AND DEBTS

Name ____________________________ Telephone Number ___________________________

I. Marital Home Address

A. Titled in Whose Name ____

B. Original Purchase Price __________________ Year Purchased ___________

C. Mortgage Company ____

Original Mortgage Amount ____

Current Mortgage Balance ____

D. Terms of Mortgage: _______________ Years At ________ % Interest

E. Second Trust of Home Equity Line Co. ___________________ Amount_____

F. Equity Calculation:

Present Value ____

Minus Current Mortgage Balance _______________________________________

Minus Balance on Home Equity or Second Trusts ___________________________

Equal Equity ____

G. Source of Funds for Purchase or Major Improvements ________________________

H. Cost of Improvements You or Spouse Have Made __________________________

I. Monthly Payments on all Loans Secured by the Home

Principal and Interest _______________________________________

Insurance _______________________________________

Taxes _______________________________________

Total Monthly Mortgage Payment _______________________________________

NOTE: If you owned a home prior to this home and did a residential rollover of capital gains, please attach IRS Form 2119 from your Tax Return from the year you purchased your current residence.

II. Other Real Property Address

Elliott Andalman ▪ Mary Ellen Flynn ▪ Daniel A. Katz ▪ Michelle Duluc ▪ P. Lindsay Parvis
Lee Plaza ▪ 8601 Georgia Ave. ▪ Suite 604 ▪ Silver Spring, MD 20910 ▪ Tel: 301.563.6685 ▪ Fax: 301.563.6681 ▪ E-mail: andalmanflynn@a-f.net

A. Titled in Whose Name ____

B. Original Purchase Price _________________ Year Purchased __________

C. Mortgage Company ____

Original Mortgage Amount ____

Current Mortgage Balance ____

D. Terms of Mortgage: ____________________ Years At _______ % Interest

E. Second Trust of Home Equity Line Co. _______________ Amount __________

F. Equity Calculation

Present Value _______________________

Minus Current Mortgage Balance _______________________

Minus Balance on Home Equity or Second Trusts _______________________

Equal Equity _______________________

G. Source of Funds for Purchase or Major Improvements _____________________

H. Cost of Improvements You or Spouse Have Made _______________________

I. Monthly Payments on all Loans Secured by the Home

Principal and Interest _______________________

Insurance _______________________

Taxes _______________________

Total Monthly Mortgage Payment _______________________

J. Do you rent out this property when not using it yourself? ____________________

Details including annual net income and cash flow (show any depreciation by attachments)

____

Note: Attach same information for any other real properties owned by you and/or your spouse.

III. Automobiles (trucks, vans, boats, etc.)

Vehicle #1

Make/Year ________________________ Condition ________________________

How Titled ________________________ Original Loan Amt. __________________

Loan Company __________________ Who Signed Loan __________________

Current Value $ _______________________ Balance Owed __________________

Agreed-upon future owner ____

Vehicle #2

Make/Year ________________________ Condition ________________________

How Titled ________________________ Original Loan Amt. __________________

Loan Company __________________ Who Signed Loan __________________

Current Value $ _______________________ Balance Owed __________________

Agreed-upon future owner ____

Note: Attach sheet if more than 2 vehicles (including boats, airplanes and motorcycles, etc.)

IV. Intangible Personal Property

A. Bank Accounts (Savings and Checking)	Titled (H, W, J)	Present Balance	Date & Amt. of Highest Balance
__________________	____	_______	___________
__________________	____	_______	___________
__________________	____	_______	___________

B. Custodial Accounts for Children or Others	Titled (H, W, J)	Present Balance	Date & Amt. of Highest Balance
__________________	_____	_______	___________

____________________	_____	_______	___________

C. Bonds (Savings and Other Bonds)

Please attach detailed list showing number of bonds, denominations, description, maturity date, % yield, date acquired, how acquired, how titled, original cost, and present value)

	Titled (H, W, J)	Present Value	Date & Amt. of Highest Value
______________________	______	_______	____________
______________________	______	_______	____________
______________________	______	_______	____________

D. Securities and Mutual Funds

Please attach detailed list showing number of shares held, description of security, how titled, how acquired, date acquired, original cost, present value, and annual income produced)

	Titled (H, W, J)	Present Balance	Date & Amt. of Highest Balance
______________________	______	______	____________
______________________	______	______	____________
______________________	______	______	____________

E. Notes and Loans Owed to You (Indicate by whom payable, amount, and date or dates payable)

Debtor	Creditor	Amount	Date Due
______________________	_________	________	________
______________________	_________	________	________

F. Life Insurance with Cash Value (Only) (e.g. whole and universal life). See #8 for listing term life insurance.

Name	Titled (H, W, J)	Present Value	Type (whole, universal)
______________________	_______	________	____________
______________________	_______	________	____________
______________________	_______	________	____________

G. Other Investments (e.g. limited partnerships)

Name	Titled	Present Value
______________________________	__________	_______________
______________________________	__________	_______________

V. **Personal Property (if an issue)**

Collections, antiques, art, jewelry, furniture, furnishings, etc. (If additional space is needed, complete on separate page.)

List only those items which have a value of over $500.00.

	Item	Title	Value	Location
a.	________________	_______	_______	______________________________
b.	________________	_______	_______	______________________________
c.	________________	_______	_______	______________________________
d.	________________	_______	_______	______________________________

VI. **Separate Property**

A. List all property acquired by you or your spouse as a gift from a third party during the marriage.

	Gift Item	Recipient	Year Acquired	Current Value
1.	___________________	___________	___________________	________________
2.	___________________	___________	___________________	________________
3.	____________________	___________	____________________	________________

B. List all property inherited by you or your spouse during the marriage.

	Item	Heir	Date Inherited	Value of Inheritance
1.	___________________	____________	________________	_____________________
2.	___________________	____________	________________	_____________________

3. ________________ ___________ ______________ __________________

C. List all property acquired by you or your spouse before the marriage.

	Gift Item	Recipient	Year Acquired	Current Value
1.				
2.				
3.				
4.				
5.				

VII. <u>List of Debts (including credit cards)</u>

Creditor	Debtor	Date Incurred	Amount	Monthly Payment	Date Balance Paid Off

VIII. <u>Life Insurance Policies (all)</u>

Insured	Company & Policy No.	Type (Term or Whole Life)	Beneficiary Where Applicable	Face Amount

IX. **Pension Assets** (Stock options, Keogh, SEPs, employee benefit plans, profit sharing plans, 401(k), IRA's and other defined benefit or defined contribution plans (attach copy of plan and last statement)

Type of Pension Asset	Titled (H or W)	Present Value	Value Upon Retirement
______________________________	_______	________	____________
______________________________	_______	________	____________
______________________________	_______	________	____________

X. **Other Assets** (e.g. trademarks, copyrights, options to purchase, judgments)

Are there any other assets we have not yet considered?____________________________________

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XI. **Are you in a professional practice or have an interest in any business partnership, joint venture or corporation?** (Please specify.) ______________________________________

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