



Blank Client Forms

Attachment to The Mid-South Divorce Guide

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What these are, and what they are not.

These are blank working documents. Print them, fill them in by hand or on screen, and bring them to your consultation. Every blank you fill in here is a question nobody has to ask you at an hourly rate.

Nothing in this packet calculates anything. That is on purpose. The numbers matter more than the arithmetic, and your attorney will run the actual calculations on the actual forms.

These are not court forms and they are not for filing. They are organizing tools to get you started. The documents your attorney's office prepares for the court will look different, will be formatted to the requirements of your county, and will be the operative versions. Do not file anything from this packet.

Estimates are fine. Write your best guess and mark it as a guess. Do not leave a line blank because you are not sure; a number somebody corrects beats a blank nobody noticed.

This packet is confidential once you fill it in. Do not email it to your spouse, do not leave it on a shared computer, and do not store it in a cloud account your spouse can reach.

What's in here

- Form 1 Document Gathering Checklist
- Form 2 Marital Balance Sheet
- Form 3 Income and Expense Worksheet
- Form 4 Parenting Plan Worksheet

FORM 1 DOCUMENT GATHERING CHECKLIST

Check the box when you have a copy. Note where the copy is stored.

Get copies of what you have a lawful right to see. Do not guess a password to obtain any of it.

Income

Federal tax returns, last 3 years *all schedules, W-2s, 1099s*

State tax returns, last 3 years

Your pay stubs, last 3 months

Spouse's pay stubs, last 3 months

Bonus, commission, or RSU statements

Business tax returns and K-1s

Social Security, pension, or disability statements

Accounts and Investments

Checking account statements, last 12 months

Savings account statements, last 12 months

Credit card statements, last 12 months *read these line by line*

Brokerage and investment statements

401(k), 403(b), IRA, and pension statements

Stock option or equity grant documents

Crypto or digital asset records

Property and Debt

Deed to any real estate

Mortgage statements and payoff amounts

Most recent property tax assessments

Vehicle titles and loan statements

Appraisals for home, business, jewelry, art

Loan documents and promissory notes

Your credit report, all three bureaus

Insurance and Personal

- Health insurance card and plan summary _____
- Life insurance policies and beneficiary designations _____
- Auto and homeowner's policies _____
- Marriage certificate _____
- Prenuptial or postnuptial agreement _____
- Prior court orders involving you or the children _____
- Children's birth certificates and Social Security cards _____
- Documents tracing any inheritance or premarital property _____

Where are your copies stored?

Somewhere outside the marital home is the right answer.

Location: _____

FORM 2 MARITAL BALANCE SHEET

List everything, including what you believe is separate property.
M = marital, S = separate, ? = not sure. When in doubt mark ?. That call is your attorney's.

Real Estate

Address	Titled To	Value	Loan Balance	Equity	M / S / ?

Vehicles, Boats, Trailers

Year / Make / Model	Titled To	Value	Loan Balance	Equity	M / S / ?

Bank and Investment Accounts

Institution	Type	Last 4	Whose Name	Balance	M / S / ?

Retirement Accounts and Pensions

Note when the plan started. The portion earned before the marriage is generally separate.

Institution / Plan	Type	Whose Name	Plan Start	Balance	M / S / ?

Business Interests

Business Name	Entity Type	% Owned	Whose Name	Value

Other Property

Jewelry, art, collections, firearms, equipment, timeshares, memberships, inheritances received.

Description	Where It Is	Value	M / S / ?

Debts

Whose name is on the ACCOUNT matters more than who a decree says should pay it.

Creditor	Type	Whose Name	Balance	Monthly Pmt.	M / S / ?

Totals

Total assets \$ _____ Total debts \$ _____
Net marital estate \$ _____

Anything unusual in the last 24 months?

Large withdrawals, transfers to relatives, property sold below value, new accounts, gifts to a third party.

FORM 3 INCOME AND EXPENSE WORKSHEET

*This is the information a Tennessee Rule 14 affidavit or a Mississippi 8.05 statement will ask for.
Use real numbers from real statements. When it is eventually filed, it is sworn testimony.*

Monthly Income, gross, before taxes

Your gross wages / salary \$ _____	Spouse's gross \$ _____
Overtime, monthly average \$ _____	Spouse's \$ _____
Bonus / commission, monthly avg. \$ _____	Spouse's \$ _____
Self-employment income \$ _____	Spouse's \$ _____
Rental income \$ _____	Spouse's \$ _____
Pension / retirement / SS \$ _____	Spouse's \$ _____
Investment / interest income \$ _____	Spouse's \$ _____
Other \$ _____	Spouse's \$ _____
TOTAL GROSS MONTHLY \$ _____	Spouse's total \$ _____

Deductions from Your Pay

Federal withholding \$ _____	State / local tax \$ _____
Social Security & Medicare \$ _____	Health insurance premium \$ _____
Retirement contribution \$ _____	Other \$ _____
NET MONTHLY TAKE-HOME \$ _____	

Housing

Rent or mortgage \$ _____	Second mortgage / HELOC \$ _____
Property taxes, if separate \$ _____	Homeowner's / renter's ins. \$ _____
HOA dues \$ _____	Maintenance and repairs \$ _____
Electricity \$ _____	Gas / heating \$ _____
Water and sewer \$ _____	Trash \$ _____
Internet \$ _____	Phone, all lines \$ _____
Streaming / cable \$ _____	Lawn / pest / cleaning \$ _____

Transportation

Car payment(s) \$ _____	Auto insurance \$ _____
Fuel \$ _____	Maintenance and repairs \$ _____
Tags and registration, monthly \$ _____	Parking / transit \$ _____

Food and Household

Groceries \$ _____
Household supplies \$ _____
Clothing \$ _____

Meals out \$ _____
Personal care \$ _____
Pet expenses \$ _____

Medical

Health ins., if not payroll \$ _____
Prescriptions \$ _____

Dental / vision \$ _____
Out-of-pocket medical \$ _____

Children

Childcare / daycare \$ _____
School fees, supplies, lunch \$ _____
Children's clothing \$ _____
Tutoring / lessons \$ _____

School tuition \$ _____
Activities and sports \$ _____
Children's medical \$ _____
Other \$ _____

Debt Payments and Other

Credit cards, minimums \$ _____
Personal / other loans \$ _____
Support paid, prior order \$ _____
Savings, outside payroll \$ _____

Student loans \$ _____
Life insurance \$ _____
Charitable giving \$ _____
Other \$ _____

Totals

TOTAL MONTHLY EXPENSES \$ _____
SURPLUS OR SHORTFALL \$ _____

TOTAL NET INCOME \$ _____

A shortfall is normal and it is useful. It is the number that supports a request for support.

FORM 4 PARENTING PLAN WORKSHEET

A preparation worksheet, not the official form. Tennessee requires the statewide Permanent Parenting Plan Order from the Administrative Office of the Courts; this is to help you think it through first.

The Children

Full Name	Date of Birth	School / Grade	Lives With Now	Special Needs?

Who Has Been Doing What

Answer honestly. Courts weigh who has actually been parenting, not who says they will.

Who takes them to school and picks them up? _____

Who schedules and attends medical and dental appointments? _____

Who handles homework and school communication? _____

Who arranges childcare? _____

Who takes them to activities and practices? _____

Who stays home when a child is sick? _____

Residential Schedule

Ordinary week you are asking for:

Summer:

Fall break and spring break:

Winter break and Christmas:

Thanksgiving, Easter, other holidays:

Birthdays, Mother's Day, Father's Day:

Decision-Making Authority

Joint, or one parent. Mark each one.

Education _____

Non-emergency health care _____

Religious upbringing _____

Extracurricular activities _____

Exchanges and Communication

Exchange location and times:

Who transports which direction:

How the two of you will communicate about the children:

Phone or video contact during the other parent's time:

Support and Insurance

Who carries health insurance _____

Monthly premium for the children \$ _____

Work-related childcare, monthly \$ _____

Who claims the children on taxes _____

How uninsured medical expenses get divided and reimbursed:

Safety Concerns

Facts and dates, not conclusions. If you are in danger, call 911.