

_____,
Plaintiff

v.

_____,
Defendant

**CERTIFICATION OF INITIAL
DISCLOSURE (SUPPORT)**

1. I am the Plaintiff Defendant in this action. I have received income during the previous twelve (12) months from the following sources (check all that apply):

- Salary or wages
- Tips
- Commissions
- Bonuses
- Fees
- Severance pay
- Income from a business (i.e., distributive share of partnership, shareholder, or LLC income, advances or draws, retained earnings, etc.)
- Pensions, retirement pay, distributions and loans from retirement plans
- Interest and/or dividends
- Income from discharge of indebtedness
- Trust income
- Annuity income
- Income from life insurance and/or endowment contracts
- Capital gains (short term and/or long term)
- Social Security benefits
- Worker's compensation benefits
- Unemployment insurance benefits
- Disability pay
- Gifts or loans
- Prizes
- Alimony or maintenance from a person not a party to this action
- Child support received for children other than the biological or adopted children of the parties
- Rental income
- Intellectual property income (copyrights, royalties on patents, etc.)
- Fringe or employee benefits (health insurance, employer retirement matching, child care benefits, paid vacation, company car, etc.)
- Deferred compensation or deferred income
- Stock or stock options in lieu of income
- Tax refunds received or applied to the next calendar year tax return
- Tax credits

- Personal injury, condemnation or other settlement awards
- Other: _____

2. Time period for which disclosure is required (check one):

- This is an **initial support claim**. (Unless specifically stated otherwise, the documents to be provided shall be for **one full calendar year preceding the date of separation through the date of service of the initial disclosures.**)
- This is a **claim to modify an existing support claim**. (Unless specifically stated otherwise, the documents to be provided shall be for the **twelve (12) months preceding the filing of the motion to modify through the date of service of the initial disclosures.**)

INSTRUCTIONS: After the initial disclosures are made, each party has a continuing duty to amend or supplement the original documentation if there has been a change in the form or substance of any of the original information provided.

Documents are considered to be in the custody or control of the party if such documents can be obtained by him or her if the party is a joint title or account holder, or if the documents were prepared by a third party (i.e., CPA, accountant, bookkeeper, etc.) at his or her direction or on his or her behalf whether individually or jointly with another.

If any of the documents required below have not been provided, in the space following each item you must give a detailed explanation of why the documents are not being provided and indicate what good cause exists for not providing the documents as required.

3. I have provided all of the documents listed below which are in my custody or control to the opposing party/counsel (check all that apply):

Documents showing the income from any source listed in #1 above, including, but not limited to, the following:

- Pay stubs, statements, vouchers and/or direct deposit receipts
- Employee benefit statements
- Stock and stock option statements
- Tax forms W-2, 1099, K-1, and other income reporting statements
- Other: _____
- Other: _____

- Company financial statements (whether audited, reviewed or compiled or internal), including, but not limited to balance sheets and profit and loss statements for **the past three (3) calendar years through the date of production**, if a party is self-employed or is a partner,

shareholder, or member holding a 5% or greater interest in a company, business, partnership, joint venture, LLC, corporation or other entity.

- [] Complete company tax return(s), including all schedules and attachments for the past three (3) calendar years through the date of service of the initial disclosures if a party is self-employed or is a partner, shareholder, or member holding a 5% or greater interest in a company, business, partnership, joint venture, LLC, corporation or other entity.

- [] Complete federal and state individual tax return(s) filed by the party, or on the party's behalf, including all schedules and attachments (W-2 forms, 1099 forms, etc.) for the past three (3) calendar years prior through the date of service of the initial disclosures, together with all year-end documentation (W-2 forms, 1098 forms, 1099 forms, extension requests, correspondence with the taxing agency, etc.) for the most recent tax year in the event the tax return has yet to be filed (or for the past three (3) calendar years if any of the last three tax year returns have not been filed).

- [] Documents pertaining to any health, life (term or whole life), casualty, automobile and liability insurance, including, but not limited to, policies, booklets describing benefits of all medical, dental or other health insurance coverage which is or could be available for a child or spouse.

- [] Complete statements evidencing ALL accounts in banks, credit unions, brokerage accounts, or other financial institutions for which the party has been a signatory.

- [] Complete account statements for all installment and credit card accounts in your name individually or with another person.

Bills, statements, invoices, mortgage payment booklets or other evidence of all outstanding debts in your name individually or with another person showing the principal balance currently owed and the payment terms.

Personal financial statements furnished to any third party (i.e., bank or other financial institution) during the two (2) calendar years preceding the date of separation and/or two (2) years prior to filing of the claim through the date of service of the initial disclosures.

Computer generated reports or data (or which can be generated) utilizing personal accounting software programs such as Quicken or Microsoft Money including any reports which show income, expenses, profit and lost, deposits and/or withdrawals.

4. CERTIFICATION: I, the Plaintiff the Defendant in this action, hereby certify that all of the documents as indicated above and required by Rule 10.2 of the Wake County Family Court Rules - Domestic have been disclosed and provided to the opposing party/counsel. I further certify that if good cause exists for not providing certain documents, I have given a detailed explanation of such good cause in the space provided.

5. I have have not served my Financial Affidavit with my initial disclosure documents as required by Rule 6.2 and/or Rule 9.2 of the Wake County Family Court Rules - Domestic.

This the _____ day of _____, 20 ____.

Signature of Certifying Party
 Plaintiff Defendant

CERTIFICATE OF SERVICE

I hereby certify that a copy of this Certification of Initial Disclosure (Support) has been served in the following manner:

By depositing a copy in the US Mail in a properly addressed, postpaid envelope to:

By hand delivery to _____

Other: _____

Date: _____

Plaintiff
 Defendant

 Attorney for Plaintiff
 Attorney for Defendant