

# Summary of Financial Affidavit Paul A. Sample

Case/Docket No. FA-2002-489

Date: 2/18/2002

## Income & Deductions

<u>Income</u>	<u>Weekly</u>	<u>Monthly</u>	<u>Annual</u>
Salary/Self-Employment Income	1,154	5,000	60,000
Other Income	129	558	6,700
<b>Total Gross Income</b>	<b>1,283</b>	<b>5,558</b>	<b>66,700</b>
<b><u>Deductions</u></b>			
Federal Income Tax	153	661	7,934
State Income Tax	0	0	0
Social Security/Self-Emp/Medicare Tax	112	486	5,826
Other Deductions	39	169	2,010
<b>Total Deductions</b>	<b>304</b>	<b>1,316</b>	<b>15,770</b>
Support - Previous Marriage	0	0	0
<b>Net Income Before Current Child Support</b>	<b>979</b>	<b>4,242</b>	<b>50,930</b>

## Living Expenses

Household Expenses	336	1,458	17,496
Transportation Expenses	126	545	6,545
Personal Expenses	156	670	8,034
Children's Expenses	19	80	960
Other Expenses	39	170	2,040
<b>Total Living Expenses</b>	<b>676</b>	<b>2,923</b>	<b>35,075</b>

## Assets & Liabilities

<u>Property</u>	<u>Total Equity</u>
Home	100,000
Other Real Property	40,000
Automobiles	18,000
Other Property	106,000
<b>Total Property</b>	<b>264,000</b>
<b><u>Financial Assets</u></b>	
Cash & Bank Accounts	18,900
Stocks	27,030
Mutual Funds	6,391
Bonds	17,150
Retirement/Deferred Compensation	95,821
Other Financial Assets	18,000
<b>Total Financial Assets</b>	<b>183,292</b>
<b><u>Miscellaneous Assets</u></b>	
Business Interests	80,000
Other Assets	0
<b>Total Assets</b>	<b>527,292</b>
Less: Liabilities	(10,000)
<b>Net Value of Assets &amp; Liabilities</b>	<b>517,292</b>

# Financial Affidavit of Paul A. Sample

Case/Docket No. FA-2002-489

Date: 2/18/2002

Court Name Family Court  
Court Circuit 16th Judicial  
Court Location Pensacola, FL  
Petitioner/Plaintiff Paul A. Sample  
Respondent/Defendant Martha C. Sample  
Marriage date 2/14/1989

## Submitter

Name Paul A. Sample  
Address 400 E. Cervantes Avenue Pensacola, FL 32  
Phone 850-222-4579  
Fax 850-222-6347  
Date of Birth 2/1/1968  
Tax filing status Single  
Tax dependents claimed 2  
Employed? yes Retired? no Date Retired:

## Job(s)

Description	Employer/Telephone/Address	Annual Pay	
Painter	Prudential Decorating Co. 850-874-3333 666 Main Stret Pensacola, FL 32502	48,000	
Owns Vending booth sports events	Sports Vending Inc. 850-333-7591 400 E. Cervantes Avenue Pensacola, FL 32501	12,000	(1) Side Business on Weekends

## Children from this marriage

Name	Date of Birth	Residing With
Edward Sample	04/04/1995	Mother
Angela Sample	05/01/1993	Mother

# Income and Deductions

## Income

Description	Monthly	
Gross salary or wages	4,000	
Overtime	500	
Business/Self-employment	1,000	(2) Sports Vending - Side business weekends
Interest	33	
Dividends	25	
	<hr/>	
	<b>5,558</b>	

**Total Income:** **5,558**

## Deductions

Description	Monthly
Federal tax	661
FICA or Self-Emp tax	394
Medicare tax	92
Mandatory union dues	16
Mandatory retirement	101
Health insurance premium	52

**Total Deductions:** **1,316**

Alimony from previous marriage:	0
Child support from previous marriage:	0

**Net Income after Deductions:** **4,242**

# Living Expenses

## Household Expenses

Description	Monthly	
Rent	850	
Home/rental insurance	55	
Electricity	44	
Telephone	38	
Cable TV	51	
Laundry/dry cleaning	10	
Food/groceries	210	(est)
Meals out	200	(est)
	<hr/>	
	<b>1,458</b>	

## Transportation Expenses

Description	Monthly	
Gas/Oil	108	
Auto repair	80	(est)
Auto loan payments	220	
Auto tags/emissions	7	
Parking	95	
Car insurance	35	
	<hr/>	
	<b>545</b>	

## Personal Expenses

Description	Monthly	
Personal clothing	55	
Personal grooming	15	
Medical insurance	52	
Term life insurance	125	
Whole life insurance	50	
Unreimbursed Medical/prescriptions	25	(est)
Unreimbursed Dental	10	(est)
Cosmetics, toiletries, sundries	8	
Entertainment	40	(est)
Sports/hobbies	150	
Vacation	100	(est)
Periodicals/Books/Tapes/CD's	20	
Gifts	20	(est)
	<hr/>	
	<b>670</b>	

## Children's Expenses

Description	Monthly
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Childrens medical/dental insurance	30	
Childrens vacations	50	(est)
	<hr/>	
	<b>80</b>	

**Payments to Creditors Expenses**

<b>Description</b>	<b>Payment</b>	<b>Period</b>	<b>Balance</b>
Painters Credit Union	125	monthly	8,000
First Federal (credit card)	45	monthly	2,000
	<hr/>		<hr/>
	<b>170</b>		<b>10,000</b>

**Total Expenses:** 

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 **2,923**

# Assets and Liabilities

## Property Assets

### Real Property - Homes

Description	Market value	Debt	Equity	Title if not joint	NonMarital
200 Eldon Lane Pensacola, FL 32502	150,000	50,000	100,000		
			100,000		

### Real Property - Other

Description	Market value	Debt	Equity	Title if not joint	NonMarital
200 Seaside Seabrook Village, FL 32506 (3) Inherited from Paul's Family	80,000	40,000	40,000	husband	husband
			40,000		

### Automobiles

Description	Market value	Debt	Equity	Title if not joint	NonMarital
1999 Honda Civic	14,000	4,000	10,000	husband	
2000 Buick Century	16,000	8,000	8,000	wife	
	30,000	12,000	18,000		

### Other Personal Property

Description	Value	Title if not joint	NonMarital
1995 Honda motorcycle	2,000	husband	
20 foot sailboat	6,000	husband	husband
Diamond Jewelry	4,000	wife	
Furniture in Marital home	30,000		
Furniture in Paul Sample Apartment	10,000	husband	
Furniture in Vacation Home	7,500		
Golf clubs	2,000	husband	
Horse and Stable (4) Wife's horse	14,000	wife	
Hunting Rifles	2,500	husband	
Original Art	20,000		
Riding Equipment	4,000	wife	
Scuba Gear	4,000	husband	
	106,000		

### Total Property Assets:

264,000

## Financial Assets

## Cash

Description	Value	Title if not joint	NonMarital
Safe deposit box	1,500		
	<b>1,500</b>		

## Bank Accounts

Description	Type	Value	Title if not joint	NonMarital
First National (Joint Act)	Checking	2,200		
First National (Paul Individual Act)	Checking	2,700	husband	
Northern Trust	Savings	12,500		
		<b>17,400</b>		

## Stocks

Description	Date of valuation	Shares	Price/Share	Value	Title if not joint	NonMarital
Colgate	1/16/2002	100	26.50	2,650		
Compaq	1/16/2002	50	21.38	1,069		
East Coast Elec	1/16/2002	200	20.00	4,000		
Exxon	1/16/2002	100	99.50	9,950	husband	
Gulf Gas	1/16/2002	25	50.00	1,250		
IBM	1/16/2002	50	95.00	4,750	wife	
Intel	1/16/2002	122	27.55	3,361		
				<b>27,030</b>		

## Mutual Funds

Description	Date of valuation	Shares	Price/Share	Value	Title if not joint	NonMarital
Fidelity Market Index	1/16/2002	33	79.21	2,614		
Fidelity Tech Index	1/16/2002	100	9.50	950		
Vanguard 500	1/16/2002	30	94.22	2,827		
				<b>6,391</b>		

## Bonds

Description	Value	Title if not joint	NonMarital
Exxon 2009	7,500	wife	
General Motors 2020	9,650	wife	
	<b>17,150</b>		

## Retirement/Deferred Compensation

Description	Value	Title if not joint	NonMarital
401-K (Prudential Decorating)	33,333	husband	
IRA (Martha Sample)	15,000	wife	
IRA (Paul Sample)	4,919	husband	
Pension (Prudential Decorating)	42,569	husband	
	<b>95,821</b>		

**Life Insurance**

Company	Policy amt	Cash value	Loan amt	Net Value	Title if not joint	NonMarital
Prudential Ins Co. Name insured:	10,000 Paul Sample	1,800	300	1,500	husband	
Travelers Ins Co. Name insured:	40,000 Paul Sample	4,000	0	4,000	husband	
				<b>5,500</b>		

**Other Financial Assets**

Description	Value	Title if not joint	NonMarital
Brokerage Account	10,000		
Loan to Lawrence Sample (5) Loan to brother	2,500	husband	
			<b>12,500</b>

**Total Financial Assets:**

**183,292**

**Miscellaneous Assets**

**Business Interest Assets**

Description	Value	Title if not joint	NonMarital
Sports Vending Co. (6) Weekend business	80,000	husband	
			<b>80,000</b>

**Total Miscellaneous Assets:**

**80,000**

**Total Assets:**

**527,292**

**Liabilities**

Description	Payment	Period	Balance	Title if not joint	NonMarital
<b>Credit card debt</b>					
First Federal	45	monthly	2,000		
<b>Bank/Credit union loans</b>					
Painters Credit Union	125	monthly	8,000	husband	
		<b>170</b>	<b>10,000</b>		

**Total Liabilities:**

**(10,000)**

**Net Value of Assets and Liabilities:**

**517,292**

## Other

**Financial Affidavit Prepared by:**

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