

FORM E FINANCIAL STATEMENT

Petitioner / 1st Applicant / Respondent / 2nd Applicant*

Between

--

and

--

Please fill in this form fully and accurately. Where any box is not applicable write "N/A". You have a duty to the court to give a full, frank and clear disclosure of all your financial and other relevant circumstances.

A failure to give full and accurate disclosure may result in any order the court makes being set aside and an order for costs being made against you.

If you are found to have been deliberately untruthful, criminal proceedings for perjury may be taken against you.

If there is not enough room on the form for any particular piece of information, you may continue on an attached sheet or paper.

Attach documents to the form where they are specifically sought and you may attach other documents where it is necessary to explain or clarify any of the information that you give.

This statement must be sworn or affirmed before a solicitor or a Commissioner for Oaths before it is filed with the Court or sent to the other party.

Important: You are recommended to obtain independent legal advice before completing this form.

*delete as appropriate

INDEX

	Page
Part 1 General Information	2
Part 2 Assets	5
Liabilities	12
Summaries of Assets and Liabilities	13
Part 3 Income	14
Part 4 Current Monthly Expenses	16
Part 5 Other Information	18
Part 6 Orders Sought	20
Part 7 Schedule of Attachments	21

Part 1 General Information

1.1 Full name

1.2 Date of birth

Day	Month	Year
-----	-------	------

 1.3. Date of Marriage

Day	Month	Year
-----	-------	------

1.4 Occupation

1.4.1 I am employed *

Self-employed *

Unemployed * and have been since

Day	Month	Year
-----	-------	------

Retired * and have been since

Day	Month	Year
-----	-------	------

1.4.2. If employed give the following details:-

I am employed on a casual basis * I have been so employed for

Years	Months
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on a fixed salary basis *

on a piece-rated basis *

otherwise * (specify)

My employer's name and address is:-

Name	<input type="text"/>
Address	<input type="text"/>

**If your present job has lasted less than 2 years
My previous occupation was:-**

From : D/M/Y	To : D/M/Y
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My former employer's name and address was:-

Name	<input type="text"/>
Address	<input type="text"/>

My previous monthly income was

HK\$

*Tick in the box that applies.

1.4.3 If self-employed give the following details:-

I am a sole proprietor *

Partner *

Shareholder *

in the following business

Name of Company	Nature and Address of business

1.5 Date of separation

Day	Month	Year	Tick here <input type="checkbox"/> if not applicable

1.6 Date of the

Petition			Decree Nisi/ Decree of Judicial Separation			Decree Absolute		
Day	Month	Year	Day	Month	Year	Day	Month	Year

1.7 If you have remarried, state the date

Day	Month	Year

1.8 If you intend to remarry, state the date, if known

Day	Month	Year

1.9 Do you co-habit with another person? Yes / No

1.10 Do you intend to co-habit with someone within the next six months? Yes / No

1.11 Details of all children of the family

Full Names	Date of birth			With whom does the child live?
	Day	Month	Year	

1.12 Give details of physical or mental disability of yourself and the children

Yourself	Children

*** Tick in the box that applies.**

1.13 Give details of the present and proposed future educational arrangements for the children.

Present arrangements	Proposed future arrangements

1.14 Give details of any maintenance arrangement or maintenance orders made between the parties.

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1.15 Give details of any other court cases between you and your spouse, whether in relation to money, property, children, or anything else and attach copy orders.

Case No.	Court

1.16 Specify your present residence and its occupants and on what basis you occupy the residence.

I live at:- (address)

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This is a self or jointly owned unit *

This is a rented unit *

Name of tenant	
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This is a Public Housing Unit (PHU) *

Name of registered tenant	
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This is a Home Ownership Scheme (HOS) Unit *

Name of registered owner	
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Otherwise * e.g. quarters, rent free (specify)

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I live alone * with others *

I live (where applicable) with the following persons:

Name	Relationship

* Tick in the box that applies.

Part 2 Assets

2.1 Give details of your interest in the matrimonial home

Address	
---------	--

The property is registered solely * jointly

In the name of a company in which you have shareholding or beneficial interest

If joint, the names of registered co-owners are:-

My share of ownership or beneficial interest is:

Particulars of purchase

Date of purchase	D/M/Y		
Downpayment	HK\$	Paid by	
Mortgage/legal charge	HK\$	Name of lender	
Other loans	HK\$	Name of lender	
Other expenses	HK\$	Paid by	
Total	HK\$		

My estimate of its present market value is:-	HK\$
My estimate is / is not based on a valuation report.	
The amount presently outstanding on mortgage or charge is:-	HK\$
The amount presently outstanding on other loans is:-	HK\$
Estimated net value	

Attach a copy of documentary evidence of mortgage / other loans

NET value of your capital interest in the matrimonial home (A)

HK\$

* Tick in the box that applies.

2.2 Give details of all other landed properties in Hong Kong or elsewhere which you own or in which you have beneficial interest.

Address	
---------	--

The property is registered solely * jointly
 In the name of a company in which you have shareholding or beneficial interest

If joint, the names of registered co-owners are:-

My share of ownership or beneficial interest is:

Particulars of purchase

Date of purchase	D/M/Y		
Downpayment	HK\$	Paid by	
Mortgage/legal charge	HK\$	Name of lender	
Other loans	HK\$	Name of lender	
Other expenses	HK\$	Paid by	
Total	HK\$		

My estimate of its present market value is:-	HK\$
My estimate is / is not based on a valuation report.	
The amount presently outstanding on mortgage or charge is:-	HK\$
The amount presently outstanding on other loans is:-	HK\$

Attach a copy of documentary evidence of mortgage / other loans

**TOTAL net value of the above (B)
(excluding the matrimonial home)**

HK\$

* Tick in the box that applies.

2.3 Give details of all bank accounts in Hong Kong or elsewhere, which you hold or in which you have an interest including those closed within the last 12 months. For joint accounts, state your interest and the names of the account holders. Attach copies of your bank statements covering the last 12 months for each account. For fixed or term deposits, attach copies of latest statements.

Name of bank	Type of account (e.g. current)	Account number	Name of other account holder (if applicable)	Balance at the date of this form	Total current value of your interest
TOTAL value of your interest in all accounts (C)					HK\$

2.4 Give details of all your shareholding / beneficial interest in private companies in Hong Kong or elsewhere. Attach copies of the last 2 years' audited / unaudited financial statements and any other documents on which you base your valuation.

Name of Company	Date & Place of Incorporation	The extent of your shareholding / beneficial interest	Your estimate of the current value of your shareholding / beneficial interest
TOTAL current value of all your shareholding / beneficial interest (D)			HK\$

2.5 List any directorships you hold or held in the last 24 months

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2.6 Give details of all other business in Hong Kong or elsewhere. Attach copies of the last 2 years' audited / unaudited financial statements and any other documents on which you base your valuation.

Name and nature of your business	The extent of your beneficial interest	Your estimate of the current value of your interest
TOTAL current value of other business interests (E)		HK\$

2.7. Give details of all stocks, bonds and other quoted securities and other investments in Hong Kong or elsewhere which you hold or in which you have a beneficial interest. (Do not include dividend income in this paragraph). Attach a copy of your latest statement for each account.

Name of Stocks / Bonds etc	Securities account(s)	The extent of your beneficial interest	Type	Current value	Total current value of your interest
TOTAL value of your interest in all holdings (F)					HK\$

2.8. Give details of all life insurance and endowment policies in Hong Kong or elsewhere which you hold or in which you have an interest, including those that do not have a surrender value. If the policy is jointly owned, or has a number of beneficiaries, identify the owners and beneficiaries.

Policy details including name of company, policy type and number	If policy is charged, state in whose favour and amount of charge	Maturity date			Surrender Value	Total current value of your interest
		Day	Month	Year		
TOTAL value of your interest in all policies (G)						HK\$

2.9 Give details of all monies which are owed to you.

Brief description of debt	Name of Debtor	Balance outstanding	Interest Owed	Total current value of the debt including interest
TOTAL value of your interest in all debts owed to you (H)				HK\$

2.10 Give details of valuable personal items including but not limited to cars, boats and jewellery.

Item	Purchase value	Estimated current value
TOTAL value of your valuable personal items (I)		HK\$

2.11 Give details of any other assets not listed above in Hong Kong or elsewhere (excluding pensions / mandatory provident fund / gratuity) including but not limited to :

- **Share option scheme, stating the estimated net sale proceeds of the shares if the options were capable of exercise now, and whether any taxes would be payable.**
- **Trust interests (including interests under a discretionary trust), stating your estimate of the value of the interest and when it is likely to become realizable. If you say it will never be realizable, or has no value, give your reasons.**
- **Specify also any asset that is likely to be received in the foreseeable future including any inheritance, any assets held on your benefit by a third party and any assets not mentioned elsewhere in this form.**

Type of asset	Value	Total net value of your interest
TOTAL value of your other assets (J)		HK\$

2.12 Give details of your pension / Mandatory Provident Fund / gratuity interests.

Attach a copy of the valuation of your pension / Mandatory Provident Fund rights by the trustees or managers of the scheme. Where the information is not available, give the estimated date when it will be available and attach the letter to pension company or administrators from whom the information was sought. If you have more than one pension plan or scheme, provide the information in respect of each one, continuing, if necessary, on a separate piece of paper. If you have made Additional Voluntary Contributions or any Free Standing Additional Voluntary Contributions to any plan or scheme, give the information separately if the benefits referable to such contributions are separately recorded or paid.

I have* do not have* the benefit of a pension scheme*, mandatory provident fund*, superannuation* or contract gratuity* from my employer.

Description of benefit	Current Value	Date Realizable	Value of maturity
TOTAL value of your pensions (K)			

* Tick in the box that applies

Part 2 Liabilities

2.13 Give details of all other liabilities which you have not disclosed above. If you have credit cards, attach copies of the latest 3 months credit card statements.

Liability	Amount
TOTAL value of your liabilities (L)	HK\$

Part 2 Summaries of Assets and Liabilities

	Reference on the section on this statement	Value
Net value of your interest in the matrimonial home	A	HK\$
Total net value of all other landed properties (excluding the matrimonial home)	B	HK\$
Total value of your interest in all bank accounts	C	HK\$
Total value of your shareholding / beneficial interest in all private companies	D	HK\$
Total value of your other business interests	E	HK\$
Total value of your interest in all holdings (e.g. stocks)	F	HK\$
Total value of your interest in all insurance policies	G	HK\$
Total value of your interest in all debts owed to you	H	HK\$
Total value of your valuable personal items	I	HK\$
Total value of your other assets	J	HK\$
	Sub-total	HK\$
Total value of your pensions, if any	K	HK\$
	TOTAL	HK\$
LESS: TOTAL value of your liabilities	L	HK\$
	NET VALUE	HK\$

Part 3 Income

3.1 Earned Income: Give details of your income. Attach copies of proof of income for the last 3 months or contract of employment, if any, and tax returns for the last 2 years.

My present basic / average* income per month is :-	
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In addition I receive :-

Overtime (average per month-based on the last 12 months)	
Double pay (average per month)	
Bonus (average per month)	
Commission (average per month-based on the last 12 months)	
Tips (average per month-based on the last 12 months)	
Housing allowance (average per month)	
Travel /Transport * allowance (average per month)	
Education allowance (average per month)	
Entertainment allowance (average per month)	
Other allowances (specify) (average per month)	
The total average per month	HK\$

3.2 Additional Income: benefits, etc. Give details and the amount of all benefits in kind, perks, or other remuneration not disclosed elsewhere, received in the last 12 months. Attach copies of proof of income for the last 3 months or contract of employment, if any.

Nature of Income	Current amount per month	Average amount per month for last 12 months

* Delete as appropriate.

3.3 Income from any part-time employment, including all benefits, if any. Attach copies of proof of income for the last 3 months or contract of employment, if any.

Nature of Income	Current amount per month	Average amount per month for last 12 months

3.4 Self-employed or partnership income: Give details of annual net profit or loss for the last 12 months. Attach copies of the tax returns for the last 2 years.

Nature of Income	Details of the last 12 months	
	Net profit/loss	Amount of your share of net profit/loss

3.5 Government allowances (including Comprehensive Social Security Assistance payments). Attach copies of latest statements.

Nature of Income	Current Amount

3.6 Other income. Give details of other income (e.g. rent, dividends, interest).

Nature of Income	Current Amount

Apart from the above I do not have any other income.

Part 4 Current Monthly Expenses

4.1 General

Item	Amount
Rent	
Mortgage instalments	
Utilities (electricity, gas, rates, telephone & water)	
Management fees	
Food	
Household expenses	
Car expenses	
Insurance premia	
Domestic helper(s)	
Other (specify)	
Total monthly household expenses	HK\$

Attach copies of the latest rental receipt.

4.2 Personal

Item	Amount
Meals out of home	
Transport	
Clothing / Shoes	
Personal grooming (including haircut and cosmetics)	
Entertainment / presents	
Holiday	
Medical / Dental	
Tax	
Insurance premia	
Interim maintenance	
Contribution to parents	
Dependent family members	
Others (specify)	
Total monthly personal expenses	HK\$

4.3 Children

Item	Amount
School fees	
Extra tuition fees	
School books and stationery	
Transport to school (including school bus)	
Medical / Dental	
Extra Curricular Activities	
Entertainment / presents	
Holidays	
Clothing / Shoes	
Insurance premia	
Lunches and pocket money	
Other Transport	
Child-minding fees	
Uniform	
Others (specify)	
Total monthly expenses for children	HK\$

**Total Monthly Expenses
(4.1+ 4.2 + 4.3)**

HK\$

4.4 Anticipated Future Expenses

Give details of any anticipated substantial changes in the above expenses in the foreseeable future.

Item	General / Yourself / Children	Anticipated Date of change	Amount after the change	Amount of Increase / Decrease

Part 5 Other information

5.1 State whether there has been significant change in your assets during the last 36 months, including any assets held outside Hong Kong.

5.2 Conduct of either party will only be taken into account in exceptional circumstances. If you feel it should be taken into account in your case, identify the nature of such conduct.

5.3 Give brief details of the standard of living enjoyed by you and your spouse during the marriage (e.g. size of home, clubs, holidays per year, domestic helper(s)).

5.4 Give brief details of the standard of living enjoyed by the children and the manner in which they were being and in which you and your spouse expected them to be educated.

5.5 Give details of any other circumstances which you consider could significantly affect the extent of the financial provision to be made by or for you or for any child of the family, including but not limited to earning capacity, disability, inheritance prospects, redundancy, cohabitation plans, and any contingent liabilities.

5.6 If you have remarried (or intend to) or are cohabiting with another person (or intend to) give brief details, so far as they are known to you, of his or her income and assets.

Monthly Income		Assets	
Nature of Income	Monthly Income	Item	Value (if known)
Total income	HK\$	Total assets	HK\$

Part 6 Orders Sought

6.1 If you are able to at this stage, specify what kind of orders you are asking the court to make.

6.2 If you are seeking a transfer, settlement or sale of any property, identify the property in question.

6.3 If you are seeking an avoidance of disposition order, identify the property to which the disposition relates and the person or body in whose favour the disposition is alleged to have been made.

Part 7 Schedule of Attachments

Please indicate with a tick in the attachments to your Financial Statement and number them with the corresponding numbers.

Part 2

- 2.1 Matrimonial Home:
Copy of latest statement of mortgage / other loans
- 2.2 Other landed properties:
Copy of latest statement of mortgage / other loans
- 2.3 Copies of bank statement of the last 12 months for each account and copies of latest statements for fixed or term deposits
- 2.4 Copies of the last 2 years' audited / unaudited financial statements of your private companies or any other documents on which valuations is based
- 2.6 Copies of the last 2 years' audited / unaudited financial statements in respect of all other business interest and any other documents on which valuation is based
- 2.7 Copies of latest statements for each securities account
- 2.12 Copy of the valuation of pension / Mandatory Provident Fund rights by the trustees or managers of the scheme
- 2.13 Copies of the latest 3 months credit card statement for each credit card

Part 3

- 3.1 Copies of proof of earned income for the last 3 months or contract of employment if any, & tax returns for last 2 years
- 3.2 Copies of proof of additional income for the last 3 months or contract of employment if any.
- 3.3 Copies of proof of income from part-time employment for the last 3 months or contract of employment if any.
- 3.4 Copies of tax returns for the last 2 years in case of self-employment / partnership
- 3.5 Copies of latest statements of government allowances

Part 4

- 4.1 Copy of latest rental receipt

Sworn / Affirmed * confirmation of the information

I

(the above named Petitioner / 1st Applicant / Respondent / 2nd Applicant)*

of

Swear by Almighty God / solemnly, sincerely and truly declare and affirm that the contents of this my affidavit / affirmation* are true and confirm that the information given above is a full, frank, clear and accurate disclosure of my financial and other relevant circumstances.

Signed

Dated

Sworn / Affirmed * by the above named [Petitioner] [1st Applicant] Respondent] [2nd Applicant]* at

on

before me

Signed
Name

A Solicitor / Commissioner* for Oaths duly appointed to take Affidavits

*delete as appropriate

Address all communications to the Chief Judicial Clerk or if the matter is in the High Court, The Clerk of Court and quote the case number from page 1. If you do not quote this number, your correspondence may be returned.

**Chief Judicial Clerk
M2 Floor Family Court Registry
Wanchai Law Courts
Wanchai Tower
12 Harbour Road, Hong Kong**

or

**If the matter is in the High Court
The Clerk of Court
High Court of Hong Kong
Ground Floor, High Court Building
38 Queensway, Hong Kong**

Explanatory Note to Financial Statement

1. The court has been asked to consider the parties' financial position and to make appropriate orders for financial provision for the parties and for any relevant children of your family.
2. It cannot perform this task unless both parties fully co-operate with each other and with the court by making full and frank disclosure of their income and financial resources.
3. The Financial Statement is a comprehensive document which both parties are required to complete to provide relevant information to the court.
4. As you will have noticed it is quite lengthy, and a substantial amount of information needs to be provided. The document has been designed to be as clear and straightforward as possible. If you have a lawyer he or she will assist you in its preparation.
5. If you are unrepresented the Financial Statement has been set out so that it can be filled in by a lay person.
6. Although it requires careful and patient reading it is an uncomplicated Financial Statement despite the number of questions that it contains. Answer all questions as truthfully and as fully as you can.
7. Some questions may not relate to your situation in which case you will not need to answer them. For those questions that do not relate to you state "Not applicable" to show that you have read the question, or put a line through the box provided for the answer.
8. This is an important matter and it is in your best interests to complete the Financial Statement as fully as possible. Allow yourself sufficient time to fill it in properly and within the time limit set by the court