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FAMILY LAW DEPARTMENT  
**FORM E GUIDANCE**  
**NOTES FACT SHEET**

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## INTRODUCTION

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The purpose of the Form E is to enable you to provide the Court with full details of your financial arrangements.

On first appearance the Form E can look very daunting but do not be put off. Many of the questions may not be applicable to your particular circumstances.

You are required to produce a significant amount of supporting documents which can take some time to obtain. Therefore please start completion of the Form E as soon as possible.

The following explanatory notes are to assist you with the completion of those sections of your Form E which require supporting documentation to be provided.).

## PART 2 – FINANCIAL DETAILS

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### Section 2.1

- You need to tell the Court if you own the matrimonial home whether solely or jointly with another.
- **If you have obtained a valuation of the property in the last 6 months, then you will need to attach a copy to the Form E.**
- **You must attach a copy of the most recent mortgage statement. Section**

### Section 2.2

- Requirements as above.

### Section 2.3

- **You must provide copy statements for each and every account you hold or have held for the last 12 months.**
- Even if the account is overdrawn, you should still provide full details.

### Section 2.4

- **You must provide a copy of the latest statement or dividend counterfoil for each and every investment listed.**

### Section 2.5

- **For each and every Endowment or Life Assurance policy with a surrender value you must provide an up to date copy of the valuation.**

### Section 2.9

- State details of all liabilities whether they are in just your name or joint with another party. This should include credit cards, store cards, loans and any overdrawn bank/ building society accounts.  
**Obtain up to date statements in support to verify the extent of the debts as you may be asked to produce these at a later stage.**

### Section 2.11

- You may wish to obtain assistance from your Accountant in completing this Section.  
**You need to provide the following supporting documentation:**

- **Copies of the last 2 years business accounts.**
- **The estimated value of your interest in the business, either by way of a valuation or a letter from your Accountant or such other documentation that can support your estimate.**

#### Section 2.13

- **You need to provide an up to date statement showing the Cash Equivalent Transfer Value (CETV) of each pension scheme. The trustee or manager of the pension scheme will be able to provide this.**
- If you do not have this information or the valuation you have is over 12 months old, you need to write to your pension provider and request an up to date valuation.
- It is important that you send off for this information immediately as it may take a long time for the information to be supplied to you.
- Write to the pension provider attaching a copy of Page 12 of the Form E as this sets out precisely the information required.

#### Section 2.15

- This relates only to income where you are employed.  
**You will also need to attach to the Form E a copy of your P60 for the last completed financial year and last 3 months pay slips.**

#### Section 2.16

- This relates to income where you are self employed
- You may wish to seek assistance from your accountant to complete this section.
  - **You will need to attach a copy of your last tax assessment.**
  - **If not available then a letter from your accountant confirming your tax liability.**
  - **A copy of the management accounts for the period since the last account if there is a significant disparity between the last year's net income and your estimated net income for the next 12 months.**

## **PART 3 – FINANCIAL REQUIREMENTS**

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#### Section 3.1

- Relates to your income needs. You need to provide details of your outgoings and expenditures either weekly, monthly or annually.
- We have a standard pro-forma to assist you to complete this section. This can then be attached to the Form E.
- These outgoings are dealt with on an average basis, therefore you will need to consider your overall long term expenditure.