

**IN THE COURT OF COMMON PLEAS OF ALLEGHENY COUNTY, PENNSYLVANIA  
FAMILY DIVISION**

_____	)	
	)	
<b>PLAINTIFF,</b>	)	
	)	
<b>vs.</b>	)	<b>F.D.</b> _____
	)	
_____	)	
	)	
<b>DEFENDANT.</b>	)	

**ORDER OF COURT**

AND NOW, this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_, it appearing that the parties are prepared to go forward with the economic claims pending between them and it further appearing that it is consistent with the efficient administration of justice that the parties exchange information and documents prior to the first conciliation, it is hereby ORDERED, ADJUDGED and DECREED as follows:

1. Within ten (10) days of the date of this Order, the parties shall enter into a stipulation as to the date of separation. To the extent the parties cannot so stipulate, each shall provide the other with the date each believes separation occurred, and a brief statement of the rationale supporting such position.
2. At least twenty (20) days prior to the conciliation date set forth below, the parties shall exchange complete (e.g., including all schedules) personal federal income tax returns for the previous three (3) years; a pay stub issued subsequent to the date of this Order containing year to date information.
3. Retirement accounts and benefits: At least 20 days prior to the conciliation date, each party shall serve upon the other party a statement verified under penalty of perjury listing all pension or retirement accounts (excluding Social Security) under which they are entitled to receive any benefits in the future, listing the correct name of the plan, the name and address of the plan administrator, and the current accrued benefit (in the case of a defined benefit plan) or in the case of an IRA, 401(k) plan or any other cash value type plan, the value of the plan as of the date of separation (see paragraph 1 of this order) **and the current value as of the date of the statement.** The parties must attach to their statements copies of documentation supporting these value/benefit contentions and the summary plan descriptions for all plans. A copy of this statement, without the attachments, shall be attached to the marital asset summary. **(Note: it is the responsibility of each party to determine, prior to signing this statement, all pension or retirement benefits to which they may be entitled, whether vested or contingent.)**
4. Parties are not required to obtain expert valuations regarding any assets prior to the first conciliation. However, they shall discuss and attempt to reach agreement on all significant valuation issues, including but not limited to, any disputes arising regarding retirement accounts; value of the

marital residence and its contents; and the marital debt of the parties. To the extent parties are unable to reach agreement on any valuation issues, they are strongly encouraged to seek an impartial appraiser to conduct a joint valuation of the disputed asset, and to stipulate to the results thereof. The parties are advised that if they fail to reach agreement regarding such valuation issues, the Court at the first conciliation or thereafter may appoint an impartial expert to value any such assets at the expense of the parties.

5. The parties shall jointly prepare a Marital Asset/Liability Summary ("Summary"), substantially in the form of the attached example. The parties are not required to identify account information, unless there are multiple accounts, in which case the parties should identify the accounts by using a series of "x's" and the last four (4) digits for each account. If the parties are unable to prepare a joint Summary, then each party shall prepare an individual Summary. Five (5) days prior to said conciliation, counsel shall serve on the Court the Summary and a written proposal for equitable distribution, as well as a draft order disposing of all matters.

6. In the event either party is requesting alimony, that party shall file a completed Budget substantially in the form attached. The party shall also indicate the duration of the desired alimony award.

7. Any stipulations entered into shall be filed with this Court's Department of Court Records, Civil Division, and a copy shall be provided to the Judge assigned to the case at least five (5) days prior to the conciliation.

8. The claims of the parties for alimony, equitable distribution, and/or counsel fees will be conciliated before Judge \_\_\_\_\_ on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, at \_\_\_\_\_ AM/PM in Room \_\_\_\_\_, 440 Ross Street, Pittsburgh, Pennsylvania 15219. Parties living within 100 miles of the courthouse must be present for the conciliation. All other parties must be available by telephone.

9. Absent compelling circumstances, this case will not be continued within 30 days of the scheduled date. (See Administration Order No. 444 of 1999).

**COUNSEL AND PARTIES SHOULD NOTE THAT FAILURE TO STRICTLY COMPLY WITH THE TERMS OF THIS ORDER MAY RESULT IN CONTINUATION OF THE CONCILIATION, FINES AND/OR COUNSEL FEES. PARTIES MAY NOT CONSENT TO WAIVE ANY PROVISIONS OF THIS ORDER.**

**By the Court:**

\_\_\_\_\_  
**J.**

## MONTHLY BUDGET EXAMPLE

CLIENT'S NAME: \_\_\_\_\_

CONFERENCE/ HEARING DATE: \_\_\_\_\_

CASE NO: \_\_\_\_\_

Gross pay per month	\$ _____	<b>ITEMIZE PAYROLL DEDUCTIONS</b>	
Average take-home pay (per month)	\$ _____	Social Sec.	\$ _____
*Other income: (average per month)	\$ _____	Medicare	\$ _____
		OPT	\$ _____
		PA State tax	\$ _____
NET Income per Month	\$ _____	Local	\$ _____

**MONTHLY EXPENSES FOR:**

Food, Household Products, Sundries	\$ _____		
Mortgage payment or rent	\$ _____	Balance Due	\$ _____
Clothing	\$ _____		
Car Payments	\$ _____	Balance Due	\$ _____
Bus, Trolley Etc.	\$ _____		
*Car Expense	\$ _____		

**Loan Payments, Charge Accounts:**

_____	\$ _____	Balance Due	\$ _____
_____	\$ _____	Balance Due	\$ _____
_____	\$ _____	Balance Due	\$ _____
_____	\$ _____	Balance Due	\$ _____

*All Medical and Dental Expenses	\$ _____	
*Insurance	\$ _____	
*Utilities	\$ _____	
*Educational Expense	\$ _____	
Taxes	\$ _____	
Household Help	\$ _____	
Child Care	\$ _____	
Barber, Beauty Shop	\$ _____	
Entertainment	\$ _____	
Papers, Books, Magazines	\$ _____	
Other Child Support	\$ _____	
Gifts	\$ _____	
Charitable Contributions	\$ _____	
Vacations	\$ _____	
Legal Fees	\$ _____	
*Other	\$ _____	
<b>TOTAL EXPENSES PER MONTH</b>	<b>\$ _____</b>	

*\*To be Itemized or Explained on Reverse Side*

**MEDICAL EXPENSES:**

Doctor	\$ _____	
Dentist	\$ _____	
Medicine	\$ _____	
Hospital	\$ _____	
Counseling	\$ _____	

**CAR EXPENSES:**

Fuel	\$ _____	
Repairs	\$ _____	
Insurance	\$ _____	
Other	\$ _____	

**EDUCATIONAL EXPENSE:**

Parochial	\$ _____	
Private	\$ _____	
College	\$ _____	
Preschool	\$ _____	

**UTILITIES:**

Gas	\$ _____	
Phone	\$ _____	
Light	\$ _____	
Water and Sewage	\$ _____	
Cable	\$ _____	

**MONTHLY BUDGET EXAMPLE (page 2)**

**TAXES:**

Real Estate \$ \_\_\_\_\_  
Personal Property \$ \_\_\_\_\_  
Income \$ \_\_\_\_\_  
Federal Withholding \$ \_\_\_\_\_

No. of exemptions claimed \_\_\_\_\_

**INSURANCE EXPENSE:**

Life for H/W/J \$ \_\_\_\_\_  
Health for H/W/J \$ \_\_\_\_\_  
Accident for H/W/J \$ \_\_\_\_\_  
Home Rent Insurance \$ \_\_\_\_\_

**ASSETS:**

Savings Accounts H/W/J \$ \_\_\_\_\_  
Checking Accounts H/W/J \$ \_\_\_\_\_  
Stocks and Bonds \$ \_\_\_\_\_  
Real Estate \$ \_\_\_\_\_  
Other \$ \_\_\_\_\_

**OTHER EXPENSES**

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

**OTHER INCOME:**

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

H – Husband  
W – Wife  
J - Joint

## MARITAL ASSET SUMMARY EXAMPLE

CLIENT'S NAME: \_\_\_\_\_

DATE OF MARRIAGE: 2-14-86  
DATE OF SEPARATION: 12-25-97  
DATE OF DIVORCE: 4-15-99

DESCRIPTION	HUSBAND'S VALUE	WIFE'S VALUE	COMMENTS
1. MARITAL RESIDENCE	\$185,000	\$160,000	HUSBAND BELIEVES FAIR MARKET VALUE IS \$185,000. WIFE DISPUTES VALUE. NEED APPRAISAL. MORTGAGE BALANCE IS \$75,000
2. WIFE'S PENSION			UNKNOWN--MUST DETERMINE THROUGH DISCOVERY AND POSSIBLE EVALUATION
3. HUSBAND'S PROFIT SHARING	\$73,115		BALANCE AS OF 3-31-99
4. WIFE'S IRA	\$36,282		VALUE AS OF 3-31-99 WIFE CLAIMS THIS IS A PRE-MARITAL ASSET, MUST DETERMINE VALUE AT DATE OF SEPARATION
5. MCDONALD'S CORPORATION STOCK			MUST DETERMINE NUMBER OF SHARES THRU DISCOVERY AND MUST VALUE STOCK. CURRENT SHARE PRICE IS \$46.
6. METLIFE INSURANCE POLICY (CASH VALUE)	\$25,834		CASH VALUE AS OF 12-31-97 MUST OBTAIN CURRENT CASH VALUE.
7. JOINT MONEY MARKET ACCOUNT	\$18,361		CURRENT VALUE (SEE 3-31-99 STATEMENT) \$10,000 WITHDRAWAL BY WIFE SHORTLY AFTER SEPARATION
8. 1997 FORD EXPLORER			MUST OBTAIN NADA VALUE, NO OUTSTANDING LOAN
9. 1996 CHRYSLER TOWN & COUNTRY VAN			MUST OBTAIN NADA VALUE, OUTSTANDING LOAN OF \$8,300
10. HOUSEHOLD FURNISHINGS			WIFE IN POSSESSION OF ALL HOUSEHOLD FURNISHINGS. MUST OBTAIN PERSONALTY APPRAISER
11. MORTGAGE ON MARITAL RESIDENCE	(\$75,000)	(\$75,000)	
12. AUTOMOBILE LOAN	(\$8,300)	(\$8,300)	
13. BILL CONSOLIDATION LOAN	(\$14,200)	(\$14,200)	PAYMENT OF \$225/MO. MADE BY HUSBAND SINCE SEPARATION. MUST GET CREDITED
TOTAL:			