

Civil Rule 26.1 Questionnaire - Disclosures Between Spouses

Within 45 days of the defendant filing the answer in the case, you must give your spouse information about property in which either of you may have an interest, including businesses and partnerships.

You must also give your spouse authorization to get records about employment benefits, bank accounts, retirement accounts, and any financially-related accounts. You can use *Release of Financial and Employment Information*, form [DR-895](#), available online at ak-courts.info/dr895.

You **do not** file this form in court. Just give it to your spouse or their attorney, if they have one. Once you send it, you will have satisfied the Civil Rule 26.1 requirements.

You do not have to use this form for your Civil Rule 26.1 disclosures, but you do have to provide all of the information to your spouse. This form is to help you organize your information. You may attach additional pages to this form if all of the items you need to disclose do not fit on the lines provided.

Name: _____

1. Real Property (houses, land, and buildings)

Do you own any real property?

☐ No.

☐ Yes:

Legal Description*

Street Address

_____	_____
_____	_____
_____	_____

* The legal description is the official "map description" of your land. It tells the lot, block, and boundaries so there is no confusion about which property it is. You can usually find it on your deed, title report, property tax records, or from the Recorder's Office.

Do you have any appraisals, tax assessments, or broker's opinions from the last two years about any of the properties listed?

☐ No.

☐ Yes, and they are attached to this form.

2. Employment

Are you employed?

☐ No.

☐ Yes, by the employer described below. I attached *Release of Financial and Employment Information*, form [DR-895](#), to this form.

Employer Name

Address

HR Phone Number

_____	_____	_____
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3. Income

This includes wages, salaries, tips, commissions, interest, dividends, income from a business partnership, social security, veteran's benefits, worker's compensation, unemployment, public assistance, net rental income, or any other income from any other source that you might have received in the past **two months**.

Did you receive any income in the past two months?

☐ No.

☐ Yes. I attached proof of all of my income for the past two months to this form (examples: pay stubs, canceled checks, receipts).

4. Retirement Accounts and Pensions

This includes all 401(k)s, 403(b)s, government PERS/TRS/FERS, military retirement, IRAs, Roth IRAs, defined pensions, deferred compensation, and profit-sharing plans.

Do you have any of these types of accounts?

☐ No.

☐ Yes, the accounts listed below. I attached *Release of Financial and Employment Information*, form [DR-895](#), to this form.

<u>Description/Company/Last 4 #'s on Acct</u>	<u>Years in Plan</u>	<u>Years During Marriage</u>
<hr/>	<hr/>	<hr/>
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5. Bank Accounts

This includes all personal and business accounts in banks, credit unions, brokerages, and other financial institutions for the last **two years**.

Do you have any of these accounts?

☐ No.

☐ Yes. I attached *Release of Financial and Employment Information*, form [DR-895](#), to this form. I also attached the past **three months** of statements for each account listed below.

<u>Name of Financial Institution</u>	<u>Business or Account Number</u>	<u>Personal or Business</u>	<u>Names on Account</u>
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6. Debts

This is any money you borrowed that you owe for services performed or items bought. Examples of debts are:

- Mortgages on homes or other real estate
- Vehicle loans or lease payment
- Liens on real property for repairs or home improvement projects
- Unpaid medical, attorney, daycare, utility, or other bills
- Credit card balance
- Personal or student loans
- Court judgments or fines

Do you have any debts?

☐ No.

☐ Yes. I attached written documentation or an account statement for each creditor that includes the principal balance and the payment terms.

<u>Name of Creditor</u>	<u>Total Amount Owed</u>	<u>Monthly Payment</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

7. Other Investments

This includes any stocks, bonds, certificates of deposit, IRAs, life insurance, annuities, cryptocurrency, or any other investment.

Do you have any of these types of investments?

☐ No.

☐ Yes. I attached the most recent statements and reports from the financial institutions or other sources pertaining to investments.

<u>Description/Company/Last 4 #'s on Acct</u>	<u>Value</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

8. Personal Property over \$100

This includes all vehicles, boats, airplanes, computers, electronics, furniture, jewelry, and other property and household goods that have a fair market value (for example, Facebook Marketplace or Craigslist value) of more than \$100.

Do you have any personal property with a fair market value over \$100?

- ☐ No.
- ☐ Yes, it is listed below.

Do you have any appraisals, tax assessments, or broker's opinions from the last two years about any of the property listed?

- ☐ No.
- ☐ Yes. They are attached to this form.

[illegible]

9. Tax Returns

You must give your spouse copies of your federal tax returns for the last **three years**. If you have not filed yet, you must give your spouse copies of all year-end tax documents such as W-2 forms, 1098 forms, 1099 forms, extension requests, etc.

Do you have tax returns for the last 3 years?

- ☐ Yes, but I am not going to provide them because we filed jointly for the past three years and my spouse has copies of all of these documents.
- ☐ Yes, and I attached copies of all federal tax returns for the past three years, including all schedules and attachments (W-2 forms, 1099 forms etc.).
- ☐ I have some tax returns, but not all because I have not filed yet. I attached copies of the federal tax returns I do have, including all schedules and attachments (W-2 forms, 1099 forms etc.) and copies of the year-end tax documents for the years I do not have a return.
- ☐ I have not filed federal taxes for the past three years.

10. Non-Marital Property

Typically, marital property is any money or benefits earned during the marriage and any property bought during the marriage. Some property can be separate, called non-marital, even if it was acquired during the marriage. Sometimes, a certain piece of property can be part marital and part separate. To learn more about this topic, go to ak-courts.info/property.

Do you think any of the property listed above is non-marital, separate property?

- ☐ No.
- ☐ Yes:

<u>Description of Property</u>	<u>Location</u>	<u>Reason Why Non-Marital</u>
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11. Medical Insurance

Do you have medical insurance?

- ☐ No.
- ☐ Yes:

<u>Insurance Company</u>	<u>Policy/Group #</u>	<u>Monthly Cost</u>
<hr/>	<hr/>	<hr/>

Family Members Covered by the Policy

Other Medical Coverage this Family
Member is Eligible For (Medicare,
Medicaid, Indian Health services,
Military TriCare, etc.), if any
