Form E documents checklist

The documents Form E asks you to attach, in the order of its Schedule of Documents. Tick each one off as you gather it.

Section 1: general information

- [ ] **Application to vary an order** — Paragraph 1.14
  If applicable, attach a copy of the relevant order.

Section 2: property

- [ ] **Matrimonial home valuation** — Paragraph 2.1
  A copy of any valuation relating to the matrimonial home that has been obtained in the last six months.
- [ ] **Matrimonial home mortgage(s)** — Paragraph 2.1
  A recent mortgage statement in respect of each mortgage on the matrimonial home confirming the amount outstanding.
- [ ] **Any other property** — Paragraph 2.2
  A copy of any valuation relating to each other property disclosed that has been obtained in the last six months.
- [ ] **Any other property** — Paragraph 2.2
  A recent mortgage statement in respect of each mortgage on each other property disclosed confirming the amount outstanding.

Section 2: accounts and investments

- [ ] **Personal bank, building society and National Savings accounts** — Paragraph 2.3
  Copies of statements for the last 12 months for each account that has been held in the last twelve months, either in your own name or in which you have or have had any interest.
- [ ] **Other investments** — Paragraph 2.4
  The latest statement or dividend counterfoil relating to each investment as disclosed in paragraph 2.4.
- [ ] **Life insurance (including endowment) policies** — Paragraph 2.5
  A surrender valuation for each policy that has a surrender value as disclosed under paragraph 2.5.

Section 2: business interests

- [ ] **Business interests** — Paragraph 2.11
  A copy of the business accounts for the last two financial years for each business interest disclosed.
- [ ] **Business interests** — Paragraph 2.11
  Any documentation that is available to confirm the estimate of the current value of the business, for example, a letter from an accountant or formal valuation if that has been obtained.

Section 2: pensions

- [ ] **Pension and PPF compensation** Paragraph 2.13

  A recent statement showing the cash equivalent (CE) provided by the trustees or managers of each pension arrangement or valuation of each PPF entitlement provided by the PPF Board that you have disclosed (or, in the case of the additional state pension, a valuation of these rights). If not yet available, attach a copy of the letter sent to the pension company, administrators or the PPF Board requesting the information.

Section 2: income

- [ ] **Employment income** Paragraph 2.15

  Your P60 for the last financial year in respect of each employment that you have.

- [ ] **Employment income** Paragraph 2.15

  Your last three payslips in respect of each employment that you have.

- [ ] **Employment income** Paragraph 2.15

  Your last form P11D if you have been issued with one.

- [ ] **Self-employment or partnership income** Paragraph 2.16

  A copy of your last tax assessment or if that is not available, a letter from your accountant confirming your tax liability.

- [ ] **Self-employment or partnership income** Paragraph 2.16

  If net income from the last financial year and the estimated income for the next twelve months is significantly different, a copy of the management accounts for the period since your last accounts.

Other documents

- [ ] **Other documents**

  You may attach other documents where it is necessary to explain or clarify any of the information that you give in the Form E.

  Each document, and the paragraph it relates to: