



---

**WILSON V. WILSON**

**ASSETS AND DEBTS SUBJECT TO  
EQUITABLE DISTRIBUTION**

FILE NUMBER: ABC 1234

Judge: Honorable Charles Bailey

Date of Report: July 12, 2004

---

Prepared by Frank A. Wisehart, CPA, CFE, CVA

Issued: July 12, 2004

Note: This as an edited version to be used for showcase or reference. All names and identifiable information have been changed herein. This is an actual report created by Wisehart & Wisehart, Inc., but it has been modified to protect the confidentiality of our clients.

---

WILSON V. WILSON

ASSETS AND DEBTS SUBJECT TO  
EQUITABLE DISTRIBUTION

Issued: July 12, 2004

---

Table of Contents:

Information Reviewed .....	4
Case History and Background .....	5
Approach and Methodology .....	5
Assets and Debts Subject to Equitable Distribution Overview .....	5
Assets and Debts Subject to Equitable Distribution Presentation .....	7
Summary of Net Distributable Marital Assets .....	9
Proposed Division and Distribution of Marital Assets and Debts .....	10
Limiting Conditions .....	11
Qualifications of Preparer .....	Exhibit A
Excerpts from Deposition of Bob Wilson, May 5, 2003 .....	Exhibit B
Kelly 200 Parkway Drive Real Estate Appraisal .....	Exhibit C
Tuten, Jr. Lot 10, Millhouse Lane Appraisal .....	Exhibit D
Hunt 100 Oakridge Lane Appraisal .....	Exhibit E
Bob Wilson BBB Financial Cash Surrender Value Life Insurance .....	Exhibit F
Diana Wilson BBB Financial Cash Surrender Value Life Insurance .....	Exhibit G

Table of Contents Continued:

---

Diana Wilson Yellow 401(k) Retirement Account.....	Exhibit H
Diana Wilson Yellow Employee Stock Purchase Plan.....	Exhibit I
Bob Wilson and Diana Wilson Personal Property Retained.....	Exhibit J
Mortgage on 200 Parkway Drive.....	Exhibit K
XYZ Mortgage on 100 Oakridge Lane .....	Exhibit L
Credit Card Debts.....	Exhibit M

DRAFT