

**(NUT) CASE V. (BASKET )CASE**  
**IT'S CALLED PROPOSED SCHEDULE OF EQUITABLE DISTRIBUTION, NOT EQUAL DISTRIBUTION - SEE 61.075(1)(a-j)**  
**EXHIBIT A**

DRAFT- FOR SETTLEMENT PURPOSES ONLY

STEP 1: IDENTIFICATION		STEP 2: CLASSIFICATION		STEP 3: VALUATION						STEP 4: DISTRIBUTION																				
DOM: 01/01/15 DOF: 07/31/21 UPDATED: 10/31/24		61.075 (7) : Cut-off date for determining marital assets/liabilities		61.075 (7) : The date of valuation is the date or dates the judge determines is just and equitable						61.075 (6)(b)(1-6) : Defines non-marital assets and liabilities						PROPOSED PLAN OF EQUITABLE DISTRIBUTION														
Length of Marriage: 6 years 6 months 30 days																			DATE OF FILING			CURRENT			FINAL FOR MEDIATION/TRIAL			NONMARITAL		
REF.	DESCRIPTION															TITLED	SOURCE	DATE	GROSS VALUE	SOURCE	DATE	GROSS VALUE	SOURCE	DATE	GROSS VALUE	HUSBAND NONMARITAL	WIFE NONMARITAL	CHILD NONMARITAL	MARITAL	HUSBAND

**ASSETS**

A Bank Accounts:				DATE OF FILING			CURRENT			FINAL FOR MEDIATION/TRIAL			NONMARITAL			PREVIOUSLY DIVIDED PER COURT ORDER			COMMENTS					
1	Bank of America Checking #1234	J	Statement	7/31/2021	124,000	Statement	10/31/2021	146,000	PARTIALLY EQUALITABLE DISTRIBUTED			-	-	-	PREVIOUSLY DIVIDED PER COURT ORDER			61.075 (5)(a-d) re: interim partial equitable distribution						
2	Bank of America Savings #4567	H	Statement	7/16/2021	6,000	Statement	10/31/2021	2,000	Statement	10/31/2021	2,000	-	-	-	2,000	2,000	-	What is the proper date of valuation? Why did the value go up or down?						
3	Wells Fargo Money Market #5678	H	Statement	8/4/2021	42,634	Statement	10/31/2021	24,145	Statement	6/1/2021	42,634	-	-	-	42,634	15,096	27,538	Passive changes in value usually justify current valuations						
4	Wells Fargo CD #7890	W	Statement	7/31/2021	30,000	Statement	10/31/2021	31,500	Statement	10/31/2021	31,500	-	-	-	31,500	-	31,500	Note: See equalization payment						
5	Legacy Bank #1357	W	Statement	7/31/2021	12,345	Statement	10/31/2021	12,345	Statement	7/31/2021	12,345	-	-	-	12,345	-	12,345	You need to understand why the change in value and present evidence to justify your position						
6	PNC Checking #4678	H	Statement	7/31/2021	336,000	Statement	11/20/2021	157,545	Statement	10/21/2021	157,545	-	-	-	157,545	-	157,545	Opened post-filing. Is it automatically non-marital? Must consider source of deposit (s)						
7	Wells Fargo Checking #1234	W	DID NOT EXIST - OPENED 9/15/21			Statement	11/8/2021	21,000	Statement	11/8/2021	21,000	-	21,000	-	-	-	-	-						
				550,979			394,535			267,024			-			246,024			17,096			228,928		
B Brokerage Accounts:				DATE OF FILING			CURRENT			FINAL FOR MEDIATION/TRIAL			NONMARITAL			PREVIOUSLY DIVIDED PER COURT ORDER			COMMENTS					
1	Merrill Lynch #2356 (Inheritance)	H	Statement	7/31/2021	589,000	Statement	11/30/2021	714,000	Statement	11/31/21	714,000	714,000	-	-	-	-	-	-	Inheritance - Clearly non-marital? What if there was commingling? To what extent is the commingling?					
2	Merrill Lynch #7890	J	Statement	7/31/2021	56,734	Statement	10/31/2021	42,147	Statement	10/31/2021	42,147	-	-	-	42,147	42,147	-	Consider the holdings and their basis. What are the tax implications? Is it more fair to split the accounts equally?						
3	Morgan Stanley #6789	J	Statement	7/31/2021	160,111	Statement	10/31/2021	211,231	Statement	10/31/2021	211,231	-	-	-	211,231	-	211,231							
				805,845			967,378			967,378			714,000			253,378			42,147			211,231		



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			DATE OF FILING			CURRENT			FINAL FOR MEDIATION/TRIAL			NONMARITAL						
REF. DESCRIPTION		TITLED	SOURCE	DATE	GROSS VALUE	SOURCE	DATE	GROSS VALUE	SOURCE	DATE	GROSS VALUE	HUSBAND NONMARITAL	WIFE NONMARITAL	CHILD NONMARITAL	TOTAL MARITAL	HUSBAND	WIFE	COMMENTS
<b>E Business Interests:</b>																		
1	Amazing Business, LLC	H	NAV - Sch A.	7/31/2021	230,000	NAV - Sch A.	7/31/2021	230,000	NAV - Sch A.	7/31/2021	230,000	-	-	-	230,000	230,000	-	What is the current method of valuation? Understand enterprise vs. personal goodwill (61.075)  See: Robbie v. Robbie 788 So.2d 990
			Market Approach: 830,000			Market Approach: 830,000			Market Approach: 830,000									
			Income Approach: 1,200,000			Income Approach: 1,200,000			Income Approach: 1,200,000									
					230,000			230,000			230,000				230,000	230,000		
<b>F Personal Property:</b>																		
1	2018 Audi Q8	H	KBB.com	Est. Current	31,650	KBB.com	Est. Current	31,650	KBB.com	Est. Current	31,650	-	-	-	31,650	31,650	-	
	Less: Auto Loan	H	Statement	5/31/2021	(16,450)	Statement	7/31/2021	(15,750)	Statement	5/31/2021	(16,450)	-	-	-	(16,450)	(16,450)	-	
	Total Equity				15,200			15,900			15,200	-	-	-	15,200	15,200	-	
2	2020 BMW X5	W	KBB.com	Est. Current	47,500	KBB.com	Est. Current	47,500	KBB.com	Est. Current	47,500	-	-	-	47,500	-	47,500	
	Less: Auto Loan	W	Statement	5/31/2021	(32,000)	Statement	7/31/2021	(29,500)	Statement	5/31/2021	(32,000)	-	-	-	(32,000)	-	(32,000)	
	Total Equity				15,500			18,000			15,500	-	-	-	15,500	-	15,500	
	Total Equity				-			-			-	-	-	-	-	-	-	
	Total Equity in All Personal Property				30,700			33,900			30,700	-	-	-	30,700	15,200	15,500	
<b>G Other Assets:</b>																		
1	Whole Life Insurance Policy (CSV)	W	Statement	7/31/2021	42,333	Statement	10/31/2022	42,333	Statement	10/31/2021	42,333	-	-	-	42,333	-	42,333	
2	Term Life Insurance (No CSV)	H	Statement	6/30/2021	-	Statement	6/30/2021	-	Statement	6/30/2021	-	-	-	-	-	-	-	
3	Jewelry	H/W	IN-KIND			IN-KIND			IN-KIND			-	-	-	IN-KIND			
4	Furniture and Furnishings	H/W	IN-KIND			IN-KIND			IN-KIND			-	-	-	IN-KIND			
5	Miles and Points	H/W	SPLIT MARITAL EQUALLY			SPLIT MARITAL EQUALLY			SPLIT MARITAL EQUALLY			-	-	-	SPLIT MARITAL EQUALLY			
					42,333			42,333			42,333	-	-	-	42,333	-	42,333	
	TOTAL ASSETS				3,617,151			3,645,203			3,501,642	968,181	1,030,438	-	1,503,023	828,794	674,229	

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REF.	DESCRIPTION	TITLED	SOURCE	DATE	GROSS VALUE	SOURCE	DATE	GROSS VALUE	SOURCE	DATE	GROSS VALUE	HUSBAND NONMARITAL	WIFE NONMARITAL	CHILD NONMARITAL	MARITAL	HUSBAND	WIFE	COMMENTS
<b>LIABILITIES</b>																		
<b>Liabilities:</b>																		
1	2020 Federal Income Taxes	J	Tax Return	4/15/22	91,000	Tax Return	4/15/22	91,000	Tax Return	4/15/2022	91,000	-	-	-	91,000	91,000	-	<i>DON'T FORGET TAXES!</i>
2	American Express #1000	J	Statement	7/31/21	1,333	Statement	10/31/21	-	Statement	7/31/2021	1,333	-	-	-	1,333	1,333	-	
3	American Express #2000	H	Statement	7/31/21	732	Statement	10/31/21	2,467	Statement	7/31/2021	732	-	-	-	732	732	-	
4	Bank of America Mastercard #9876	W	Statement	7/31/21	500	Statement	10/31/21	-	Statement	7/31/2021	500	-	-	-	500	-	500	
5	Nordstrom #1333	W	Per FA	7/31/2021	Paid in full	Per FA	6/30/2021	Paid in full	Per FA	7/31/2021	Paid in full	-	-	-	PAID IN FULL MONTHLY			
6	Saks #5555	W	Per Rogs	7/31/2021	Paid in full	Per Rogs	6/30/2021	Paid in full	Per Rogs	7/31/2021	Paid in full	-	-	-	PAID IN FULL MONTHLY			
7	Student Loans	H	Statement	7/31/2021	126,000	Statement	10/31/2021	125,000	Statement	7/31/2021	126,000	64,000	-	-	62,000	62,000	-	
<b>TOTAL LIABILITIES</b>					<b>219,565</b>			<b>218,467</b>			<b>219,565</b>	<b>64,000</b>	<b>-</b>	<b>-</b>	<b>155,565</b>	<b>155,065</b>	<b>500</b>	
<b>NET WORTH</b>					<b>3,397,586</b>			<b>3,426,736</b>			<b>3,282,077</b>	<b>904,181</b>	<b>1,030,438</b>	<b>-</b>	<b>1,347,458</b>	<b>673,729</b>	<b>673,729</b>	

CASH TO EQUALIZE (0) 0

NET ESTATE TO PARTIES 673,729 673,729

*When there is an equalization payment, how is it being paid? Build it into your schedule - Tell the Judge! For example, See A3, A5, A6 AND B3*