

Business Ownership Disclosure Worksheet

A structured worksheet for recording business ownership details in preparation for divorce financial disclosure and business valuation proceedings.

**Business overview • Ownership structure • Income and valuation • Document checklist
• Two business entries • Summary**

Educational resource only. Not legal, financial, or tax advice.

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Educational resource only. Not legal, financial, or tax advice. Consult a qualified professional for guidance specific to your situation.

How to use this worksheet

- Complete one section for each business interest you or your spouse own
- Include all business types: sole proprietorships, partnerships, corporations, LLCs, etc.
- Estimated values are a starting point — formal valuations may be needed
- Include interests held in your name, your spouse's name, or jointly
- Include minority shareholdings and silent partnerships
- Share with your attorney before completing any financial disclosures

Why business interests need special attention

- Business ownership creates more disclosure complexity than other assets
- Income and value can be influenced by the business owner — specialists may be needed
- Business started before marriage may be separate property — but growth during marriage may be marital
- Professional business valuation is typically required for divorce proceedings
- Forensic accounting may be needed where income concealment is a concern
- Both the business value and the owner's income drawn from it are relevant

Business interest classification

- Marital business interest: generally a business started or significantly grown during the marriage using marital resources
- Separate business interest: generally a business owned before the marriage and kept separate from marital funds
- Mixed: a pre-marital business that grew significantly during the marriage — classification may be complex
- Consult your attorney to establish which classification applies to each business interest in your case

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Business 1: Overview

Business name: _____

Business type (sole proprietor, LLC,
S-corp, C-corp, partnership): _____

Industry / nature of business: _____

Date business formed: _____

State of formation: _____

Registered agent (if applicable): _____

Business address: _____

Business 1: Ownership Structure

Owner name (H / S / J / Other): _____

Ownership percentage: _____

Other owners (names and
percentages): _____

List all co-owners, partners, or shareholders

Was the business started before the marriage?

☐ Yes

☐ No

Date of marriage business value (if
known) (\$): _____

Supports separate property argument for pre-marital businesses

Has a formal business valuation been obtained?

☐ Yes

☐ No

Estimated current business value
(\$): _____

A professional valuation is typically required for divorce proceedings

Business 1: Income and Compensation

Owner's salary drawn from business (\$): _____

Year: _____

Distributions or drawings (\$): _____

Year: _____

Bonuses or profit share (\$): _____

Year: _____

Other compensation (vehicles,
benefits, expenses) (\$): _____

Business net profit (last full year)
(\$): _____

Business 1: Documents Checklist

Document / Record	Obtained
☐ Business tax returns (past 3 years)	☐
☐ Business bank account statements (past 2 years)	☐
☐ Profit and loss statements (past 3 years)	☐
☐ Balance sheets (past 3 years)	☐
☐ Shareholder, partnership, or operating agreement	☐
☐ Articles of incorporation / organisation	☐
☐ Any existing business valuations or appraisals	☐
☐ Accounts receivable and payable records	☐

[] Payroll records (past 2 years)	[]
[] Loan agreements secured by the business	[]

Additional notes:

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Business 2: Overview

Business name: _____

Business type (sole proprietor, LLC,
S-corp, C-corp, partnership): _____

Industry / nature of business: _____

Date business formed: _____

State of formation: _____

Registered agent (if applicable): _____

Business address: _____

Business 2: Ownership Structure

Owner name (H / S / J / Other): _____

Ownership percentage: _____

Other owners (names and
percentages): _____

List all co-owners, partners, or shareholders

Was the business started before the marriage?

☐ Yes

☐ No

Date of marriage business value (if
known) (\$): _____

Supports separate property argument for pre-marital businesses

Has a formal business valuation been obtained?

☐ Yes

☐ No

Estimated current business value
(\$): _____

A professional valuation is typically required for divorce proceedings

Business 2: Income and Compensation

Owner's salary drawn from business (\$): _____

Year: _____

Distributions or drawings (\$): _____

Year: _____

Bonuses or profit share (\$): _____

Year: _____

Other compensation (vehicles,
benefits, expenses) (\$): _____

Business net profit (last full year)
(\$): _____

Business 2: Documents Checklist

Document / Record	Obtained
☐ Business tax returns (past 3 years)	☐
☐ Business bank account statements (past 2 years)	☐
☐ Profit and loss statements (past 3 years)	☐
☐ Balance sheets (past 3 years)	☐
☐ Shareholder, partnership, or operating agreement	☐
☐ Articles of incorporation / organisation	☐
☐ Any existing business valuations or appraisals	☐
☐ Accounts receivable and payable records	☐

[] Payroll records (past 2 years)	[]
[] Loan agreements secured by the business	[]

Additional notes:

Business Ownership Summary

Business	Owner (H/S/J)	% Owned	Pre-marital ? (Y/N)	Est. Value (\$)	Valuation Obtained?
Business 1					
Business 2					
Additional business (if any)					
TOTAL VALUE					

Next steps — Share this completed worksheet with your attorney and, where appropriate, a forensic accountant. A professional business valuation is typically required for any business interest that forms part of the marital estate. If you have concerns about the accuracy of income or value reported by a business-owning spouse, a forensic accountant with business experience can analyse records and identify discrepancies.

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Takes less than 2 minutes. No personal information required.

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