



DIVORCE DOCUMENT CHECKLIST FOR CLIENTS

Real property

- Obtain Comparative Market Analyses to get an idea of the values for the marital residence and other real property owned or acquired during the marriage.
- Gather mortgage documents and statements for the past year.

Income documentation

- Current salary, pay stubs, bonus and/or commission documentation.
- Federal and state income tax returns, W-2s, 1099s for the past 3 years.
- Copies of pay stubs.
- If you or your spouse is self-employed, copies of corporate tax returns, stock certificates, books and records, and/or cash receipts ledgers.
- Make a list of employer-provided benefits.

Bank Accounts

- Bank account statements for the past 3 years for accounts in joint or individual names.
- If you or your spouse transacts banking or pays bills online, you might be able to gain online access to joint accounts by setting up your own password with the financial institution.
- Stocks and brokerage account statements for the past three years.

Retirement Assets

- Obtain current balance for any 401K accounts or retirement accounts.
- Statements concerning all retirement accounts such as IRAs and 401(k)s.
- Statements and accrued benefits for pensions, annuities and stock options.

Vehicles

- Copies of loan documentation.
- Titles to all vehicles.
- Obtain the Blue Book values for all vehicles.

Personal Property

- Make a list of all assets such as furniture, art, and jewelry.
- Determine the approximate value of each item.
- Identify items that are important to you and would like to keep.

Monthly Expenses

- Create and maintain a spreadsheet listing all household expenses.
- Review checking account and credit card statements over the past two years.
- Identify your financial needs after divorce.

Debts

- Credit card statements and other loan documentation for the past three years.
- Request a copy of your recent credit report.

Insurances

- Copies of health insurance policies.
- Copies of health savings accounts.
- Life insurance policies and safe deposit box.

Children

- Copies of school records for each child.
- Notify your children's schools with any changes to each parent's address or pick-up and drop-off authorizations.
- Documentation of child care expenses.