



DOCUMENT CHECKLIST

To the extent that they apply to your situation, below is a list of documents you and your spouse will need to provide before we can perform a divorce analysis. A OneDrive link to a shared, secure folder will be provided, or you can scan and email as long as you use encryption or password protect sensitive information. All documents need to be from the agreed upon date of separation or as close as possible.

- Fully Completed "Financial Information" document for each party
- Last 3 years of tax returns with all supporting schedules and W-2s
- Most recent month of pay stubs from each employer
- Statements from any employee retirement plan, pension, or deferred comp plan
- Most recent statement on any Employee Stock Option, Employee Stock Purchase Plan, Stock Award, or Restricted Stock accounts.
- Most recent statement on any investment accounts
- Most recent statements for all bank accounts, checking and/or savings
- Most recent mortgage statement(s) – primary, investment and rentals
- Most recent statements for any and all credit cards with balances.
- Most recent statement for any other outstanding loans.
- Policy statements or information on any and all Life Insurance, Annuities, or Cash Value Insurance
- Most recent Insurance Policy for all autos owned that show VIN numbers. Write in current mileage on vehicle policy page.
- For any businesses owned, a full Profit and Loss Statement and Balance Sheet for current and previous 2 years
- Social Security Estimate statements for both parties if either is over age 45. These are available at www.SSA.gov

While this is a general list of documents needed, there is a good chance we will need to request additional documentation once we become familiar with your specific and unique situation.