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 provided, or you can scan and email as long as you use encryption or password protection on sensitive. 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.

- ☐ Fully Completed "Financial Information" Packet
- ☐ Last 3 years of tax returns with all supporting schedules and W-2s
- ☐ Most recent 3 months of pay stubs from each employer
- ☐ Most recent 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
- ☐ Last 3 monthly 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