

## CHECKLIST

## THINGS FOR YOU TO GATHER

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### Income

1. Paystubs for the last 3 months
2. Tax returns for the last 3 years
3. Employment contract
4. Employment Handbook which explains benefits

### Bank and Investment Accounts

5. The most recent statements on all accounts

### Financial statement

6. If you have had any reason in the last 3 year to make of list of all your assets and debt, such as for a bank when getting a loan, then a copy of that.

### Retirement

7. The latest statement of any retirement account or pension benefit.
8. If any of your retirement was accumulated before your marriage, what documents can you find to determine how much was there before the marriage.

### Monthly Expenses

9. If we are going to be talking about more than child support, such as spousal support, then fill out the monthly expense sheet. It is available in excel from us, if it does not download off our website in excel.

### House and other real estate

10. Deed
11. Mortgage balance
12. Line of credit balance and contract for the loan
13. Any appraisal you have had done in the last 2 years.

### Vehicles

14. Copy of title
15. Balance of any debt

### Household property

16. Appraisals on art or jewelry.
17. We will discuss the various ways to divide household items, but there may eventually be a need to create a list.

### Debt

18. Latest credit card statements (more statements might be needed if the charges need to be discussed)
19. Balance on any debt. May need to know who is on the debt, the origin of the debt, etc.
20. A copy of your credit report. You can get this at [www.annualcreditreport.com](http://www.annualcreditreport.com)

### Your children

21. If your children were adopted, do you have the adoption order?
22. If your children were a result of artificial insemination, do you have that court documents for that?
23. Any special needs your child has?

### Insurance – health

24. If you are carrying health insurance on your children, then obtain the break down so that you can tell exactly what part of the premium is used to pay insurance for the children. Know this amount both now, and what the amount would be if you are dropping your spouse off the coverage after the divorce.

### Insurance – Life

25. The declaration page
26. Cash value

### Estate Planning

27. Any trust which you have signed.
28. Any trust which owns any of your property.