

DIVORCE DOCUMENT CHECKLIST

- Family business percentage ownership, tax returns, financial statements
- Forms W-2 and 1099 for the past 3 years
- Pay stubs for the last 4 months
- Most recent personal and business bank account statements (Checking, Credit Union, and Savings for last 3 months)
- Most recent Brokerage Investment account statements (CD's, Mutual Funds, Annuities)
- Most recent Retirement account statements (IRA, 401k, Pension, Profit Sharing, Deferred Compensation Plans)
- Employer Stock Option statements and Restricted Stock statements
- Most recent 3 months statement for Credit Cards and Frequent Flyer Miles (from each credit card)
- Most recent Mortgage statements for all real estate assets. Need current market value and loan balance for all real estate assets
- Most recent Life Insurance statements with cash and/or loan value, LTC and Disability insurance statements
- Most recent Auto, Boat, Trailer, or other vehicle loan/lease statements with balance. Need current value for each vehicle
- Need approximate current market value for household furniture and furnishings, jewelry, antiques, art, coin and other collections
- Any other assets not noted above. Need current market value
- Any other outstanding debts/loans not noted above. Need outstanding balances and monthly payments
- Employee Benefit Statements/Booklet
- Most recent Social Security statement
- Bonus plans
- Current Wills, Trust documents, and other legal documents

Work with a Certified Divorce Financial Analyst® (CDFA™) to increase your chances of reaching a divorce settlement that fully addresses your long-term financial needs.