

Checklist Prepare for a Divorce

It is best to make copies of the most recent set of documents that you can find for as much of the following that may apply to you. It is important to note you should not make any changes until you speak to an attorney.

Household Cash Flow

- Bank statements:**
checking, savings, money market, CD's
- Income:**
Pay stubs, W2's, 1099's
- Credit card statements:**
for at least three months
- Tax Returns:**
Personal and Business for the last three years
- Insurances:**
Group life, personal life, umbrella, disability, health, dental, vision, long term care, homeowner's, automobile
- Business:**
Corporate financial statement, rental agreements/leases, valuations

Financial Documentation

- Estate Planning Documents:**
wills, trusts, living wills, powers of attorney
- Major Gifts:**
Details on any major gift received by either party
- Credit Report:**
Look at yours to see a list of all items that will impact your credit
- Other:**
Marriage certificates, previous divorce decrees, pre-nuptial or post-nuptial agreements, airline miles documents, inventory of safe deposit boxes, list of valuables in the home

Assets and Liabilities

- Retirement Accounts:**
401k, 403b, 457, 401a, IRA, Roth IRA, Simple IRA, SEP IRA, profit sharing, stock options, thrift savings plans
- Non-Retirement Accounts:**
Individual, Joint, Tenants in Common
- Trust Accounts:**
Revocable, Irrevocable, Charitable
- Loans and Debts:**
Mortgage, Car loans, school loans, personal loans, family loans, credit card statements
- Annuities:**
Fixed, variable
- Personal Property:**
Titles to cars, deeds to real estate, jewelry or art appraisals

Professional Support Contacts

Attorney
Financial Advisor
Accountant
Insurance Agent

Notes: _____

