DIVORCE PLANNING **CHECKLIST**

Below is a checklist of useful documents and information to have on-hand when working with your attorney, mediator, and/or financial advisor during your divorce. Gathering these documents early in the process will help you navigate the process in the smoothest, most cost-effective manner. If you have questions about these documents or where to find them, please don't hesitate to reach out to us. Our contact information is at the bottom of this page.

- [ ] **Personal information for you and your spouse**
  - Names
  - Dates of birth
  - Date of marriage
  - Date of separation
  - Names & ages of children (from this marriage & other relationships)
- [ ] **Individual income tax returns for past three years (state & federal)**
- [ ] **Business income tax returns for past three years (state & federal)**
- [ ] **Current income information**
  - W-2 forms
  - 1099 forms
  - K-1s
  - Recent paystubs
- [ ] **Spouse's current income information**
  - W-2 forms
  - 1099 forms
  - K-1s
  - Recent paystubs
- [ ] **Prenuptial or post-martial agreements, if applicable**
- [ ] **List of assets you own including most recent statements for anything on the list**
  - Bank account statements
  - Brokerage statements
  - Etc.
- [ ] **List of debts you owe including most recent statements for anything on the list**
  - Mortgage statements
  - Credit card statements
  - Auto loans
  - Etc.
- [ ] **Documentation regarding retirement for you and your spouse**
  - 401(k) statements
  - Pension plan documents
  - IRA statements
  - Etc.
- [ ] **Documentation regarding stock options & restricted stock, incl. vesting schedules**
- [ ] **Real property valuation documents**
  - Appraisal
  - Market analysis
  - Etc.
- [ ] **List of contents of safe deposit boxes or safes**
- [ ] **List of automobiles you own & valuation information from National Automobile Dealers Association (www.nada.org)**
- [ ] **Business financial statements for the past three years**
  - Profit & loss statements
  - Balance sheets
  - Etc.
- [ ] **Loan application forms for loans taken out within the past three years**
- [ ] **List of separate assets claimed for each spouse**

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