

## CHECKLIST

## THINGS FOR YOU TO GATHER

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**Note, all of these things may not be needed in your particular case. Wait until we meet before going through a lot of trouble.**

### 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.
9. If one of you has started receiving a pension type retirement, we need to know if you have chosen a joint/survivor annuity. If so, we need the paperwork on that election.

### Monthly Expenses

10. 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

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

### Vehicles

For the vehicle you will be receiving, is your spouse's name also on the title? If so, we need the VIN number.

15. Copy of title or Registration will have the VIN number
16. Balance of any debt

### Household Property

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

### Debt

19. Latest credit card statements (more statements might be needed if the charges need to be discussed)

20. Balance on any debt. May need to know who is on the debt, the origin of the debt, etc.
21. A copy of your credit report. You can get this at [www.annualcreditreport.com](http://www.annualcreditreport.com)

### **Your Children**

22. Were your children adopted? If so, we will need a copy of the adoption order if possible?
23. Were your children a result of artificial insemination? If so, do you have a court document for that?
24. Are there any special needs your child has?
25. Are your children currently in child care? What does it cost? Do you expect them to be in the future?
26. Do your children attend a school which requires tuition?

### **Insurance – Health**

27. Who pays for the health insurance?
28. Who is covered under the plan? 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**

29. The declaration page
30. Cash value
31. Do you have plans on your spouse and children? Will you continue to pay these?

### **Estate Planning**

32. Any trust which you have signed.
33. Any trust which owns any of your property.
34. Advance Directive to Physicians
35. Last Will & Testament
36. Durable Power of Attorney
37. Do you wish to change who makes decisions on your health care before the divorce is done?

### **Cell Phones**

38. Do you share a cell phone plan? If so, who is the carrier?

### **Military**

39. Have either of you served in the military?
40. Do you have military retirement?