Financial DOCUMENT CHECKLIST

IF YOU SEE DIVORCE IN YOUR FUTURE, IT'S IMPORTANT TO START TO GATHER FINANCIAL INFORMATION. YOU WILL SAVE TIME, MONEY, AND LOWER YOUR STRESS BY GETTING THIS ORGANIZED. KEEP IN MIND: YOU MAY NEED TO GATHER MORE INFO BEYOND THIS CHECKLIST. NOT ALL OF THESE CATEGORIES WILL APPLY TO YOU. OR IF THEY APPLY TO YOU, YOU MIGHT NOT HAVE ACCESS TO THEM. GATHER WHAT YOU'RE ABLE; TAKE ONE STEP AT A TIME. BREATHE.

INCOME

- [ ] Pay statements for last two pay periods
- [ ] Federal and state tax returns for the past two years, including schedules
- [ ] Most recent Social Security statement(s)
- [ ] Expenses/cash flow*
- [ ] Other current income (part-time work, rental income, etc.) Pensions

CASH ACCOUNTS

- [ ] Certificates of deposit (CDs)
- [ ] Checking, savings and money market balances
- [ ] Money market mutual funds

INSURANCE

- [ ] Statement for life insurance contracts
- [ ] Disability income insurance contracts
- [ ] Long-term care insurance contract
- [ ] Employee benefits summary

INSURANCE

- [ ] 401(k), 403(b), 401(a), 457 and/or other plans*
- [ ] Traditional IRAs
- [ ] Roth IRAs
- [ ] SEP/SIMPLE IRAs/Solo 401(k)
- [ ] Stock awards (statement & benefits book)

NONQUALIFIED ACCOUNTS

- [ ] Brokerage statements
- [ ] Stock options
- [ ] Mutual funds
- [ ] Annuities
- [ ] Deferred compensation plans

EDUCATION FUNDING ACCOUNT

- [ ] 529 plans
- [ ] Coverdell ESAs
- [ ] UGMA/UTMAs

Financial DOCUMENT CHECKLIST

REAL ESTATE

- [ ] Mortgage statement or loan information
- [ ] Primary residence value
- [ ] Real estate values

BUSINESS OWNERSHIP

- [ ] Business tax returns, including schedules
- [ ] Business valuation/appraisals
- [ ] Buy/sell agreements

LIABILITIES

- [ ] Mortgage/home equity loans
- [ ] Student loans
- [ ] Auto loans
- [ ] Credit card debt/line of credi

OTHER

- [ ] Statement of value of assets before marriage (if applicable / if obtainable)
- [ ] Statement of other non-marital property (such as inheritance