Divorce Information Checklist

(Things to Collect)

The following documents and other information will help your divorce attorney, mediator or divorce financial analyst advise you regarding your divorce. Collecting these documents early in the divorce process can help you navigate your divorce in a cost-effective manner.

GETTING ORGANIZED

- ☐ Gather the contact information for you team, resources, and support
- ☐ Document you personal information for you and your spouse (names, dates of birth, date of marriage, date of separation, names, and ages of children from this marriage and from other relationships)

TAXES

- ☐ Individual income tax returns for past three years (federal and state)
- ☐ Business income tax returns for past three years (federal and state)

ASSETS

- ☐ List of assets/statements of things you own, including most recent statements for anything on the list (e.g., bank account statements, investment statements, etc.)
- ☐ Documentation regarding retirement plans for you and your spouse (401(k) statements, pension plan documents, IRA statements, etc.)
- ☐ Documentation regarding stock options and restricted stock, including vesting schedules
- ☐ Real property valuation documents (appraisal, market analysis, etc.)
- ☐ Owned real estate documents
- ☐ Inheritance documentation
- ☐ List of contents of safe deposit boxes or safes
- ☐ List of automobiles/boats/RVs you own and valuation information from Kelley Blue Book (www.kbb.com)
- ☐ List of separate assets claimed for each spouse.
- ☐ Household furniture/collections/decor

- ☐ Frequent Flyer points/statements

DEBTS

- ☐ List of debts you owe, including most recent statements for anything on the list (e.g, mortgage statements, credit card statements, auto/boat/RV loans, etc.)
- ☐ Loan application forms for loans taken out within the past three years
- ☐ Subscriptions agreements
- ☐ Club Memberships contracts

EARNINGS

- ☐ Information regarding your current income (W-2 forms, 1099 forms, K-1s, recent paystubs)
- ☐ Information regarding your spouse's current income (W-2 forms, 1099 forms, K-1s, recent paystubs)

EXPENSES

- ☐ Copies of your family budget
- ☐ Subscriptions agreements
- ☐ Club Memberships contracts

OTHER (LEGAL DOCUMENTS, MEMBERSHIPS, ETC)

- ☐ Prenuptial or post-marital agreements (if applicable)
- ☐ Copies of Trusts and/or Wills
- ☐ Life Insurance policies
- ☐ Business financial statements (profit and loss statements, balance sheets) for past three years