

Intelligent Divorce Made Possible

Financial Information Checklist

Some Financial Next Steps:

- Obtain credit reports from AnnualCreditReport.com
- Apply for personal credit in your name
- Set up confidential email and mailing address
- Obtain copies of all relevant financial information
- Estimate pre- and post-divorce monthly expenses for you and children
- List, document and photograph valuables and items of special meaning

Income information:

- Paystubs-most recent from all employment sources
- Last 3 years filed tax returns-personal and joint with any amendments

Statements for:

- Checking, savings, money market and CD accounts
- Savings bonds and cash held in safety deposit boxes/safes
- Investment and individual stock/bond account
- Retirement accounts including 401K, IRA, ROTH, SEP IRA, 403B, 457 Plans, Thrift Plans
- Pension plan statements and documents
- Closely held business statements, interest and debt obligations
- Stock options
- Corporate bonus and incentive plans
- Annuity holdings
- Term, universal and whole life insurance policies
- Mortgage and real estate owned valuations
- Personal, auto, home equity and school loans
- Credit card and any outstanding debt obligations
- Health insurance coverage and plan documents

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