



## Initial Document Checklist for Divorce

### FINANCIAL INFORMATION

- State and Federal individual income tax returns for the past 3 years
- W-2 statements for the past 3 years
- Paystubs for the past 12 months
- Bank statements for the past 12 months for all checking and savings accounts (individual and joint)
- Monthly statements for the past 12 months for any stock, bond, or mutual funds
- Account statements for annuities, CDs, 529s, etc for the past 12 months

### RETIREMENT INFORMATION

- Account statements for 401k, 403b, IRA, SERP, SEP, and pension for the past 12 months
  - If any of the retirement accounts were started pre-marriage, provide a statement from the date of marriage or as close to the date as possible.

### PROPERTY INFORMATION

- Full legal description for all properties (including timeshares). Please note, this is likely not the legal description on notices from the county but can be found on the title or deed.
- Most recent tax valuation notice for all properties (including timeshares)
  - If any of the properties were acquired pre-marriage, indicate the value of the home on or near the date of marriage by providing a tax valuation notice for that year or an appraisal
- List of items valued over \$500 (examples include jewelry, electronics, guns, and tools)
- Kelly Blue Book values for all motor vehicles (include screenshot or printout of actual value)
- Value of all recreational vehicles, boats, trailers, motorcycles (include screenshot or printout of value)

### BILLS AND OUTSTANDING DEBT (include joint and individual)

- Monthly statements for all credit cards for the past 12 months
- Monthly statements for all mortgages for the past 12 months
  - If any of the mortgages were opened pre-marriage, include a statement on or near the date of marriage
- Monthly statements of all other loans for the past 12 months (auto, student, personal, etc)
- Monthly statements for all other debts for the past 12 months (medical bills, etc)

### INSURANCE INFORMATION

- Face sheet for all life, disability, accidental, or long term care insurance policies
- Detailed cost of medical, dental, and vision insurance offered through your employer (include cost for all options like single, single+1, family, etc)