BrainstormingWomen

Financial Document Checklist

This is a list of documents that you and your spouse will need to compile as soon as possible. Once we begin working together, we will set up a Dropbox folder so you may upload the documents.

1. If Financial Affidavits have already been completed, provide copies

2. Client Data Sheet (we will provide) with Post-Divorce Budget estimates

3. 3 years of tax returns with all supporting schedules and W-2s

4. Last 3 month's statements on all investment accounts

5. Last 3 month's statements for all bank accounts, checking and/or savings

6. Most recent three statements from any employee retirement plan, pension, or deferred comp plan

7. Most recent statement on any Employee Stock Option, Employee Stock Purchase Plan, or Restricted Stock accounts.

8. Most recent mortgage statement

9. Most recent pay stubs for each party

10. Last 3 month's statements for any and all credit cards with balances.

11. Copies of most recent statements for any outstanding loans.

12. Policy statements or information on any and all Life Insurance, Annuities, or Cash Value Insurance

13. Social Security Estimate statements for both parties. These are available at www.SSA.gov 14. For any businesses owned, a full Profit and Loss Statement and Balance Sheet for current and previous 2 years

15. For all autos owned - VIN numbers and current mileage on vehicle.