B r a i n s t o r m i n g W o m e n

Financial Document Checklist

Expenses - Personal and Household for the last 12 months

Tax Returns – Client, Spouse, Joint for the last 3 years.
Please include, as applicable:

- o Personal Tax Returns
- o W-2s and 1099s
- o Partnership/Corporate Tax Returns
- o Any amended Tax Returns

Retirement Accounts - Most Recent Statements for both spouses

· IRA, Roth IRA, Keogh, SEP, 401K, 403B, 457, & Non-Qualified Deferred Compensation Statements

Primary Residence and Other Real Estate

- o Appraisal if available
- o Date of Purchase
- o Purchase Price
- o Original Mortgage Amount
- o Current Mortgage Amount (Latest Statement from Lender)
- o Interest Rate and Term

This is a list to get you started, additional documents may be required

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