



LEGAL DOCUMENTATION CHECKLIST

OBJECTIVE

This section provides a structured checklist to help you gather, organize, and prepare all necessary legal documents required for your divorce process. Completing these actionable steps ensures that you are well-prepared for legal consultations, streamline your interactions with your legal team, and facilitate a smoother and more efficient divorce settlement.

1. OBTAIN AND COMPLETE RETAINER FORM (IF HIRING A FAMILY LAWYER)

Description:

Choose a time of day when you are most alert and composed to attend meetings with your legal team.

Explanation and Strategies:

The retainer form is a contractual agreement between you and your lawyer that details the scope of their services, payment structure, and other essential terms. Acquiring and thoroughly completing this form is crucial as it sets clear expectations and responsibilities for both parties. To ensure clarity, review each section carefully, ask questions about any unclear terms, and negotiate adjustments if necessary to align with your financial and legal needs. Keeping a signed copy in your divorce folder will provide a reference point throughout your legal proceedings.

☐ COMPLETE

Comments:

e.g., "Reviewed the retainer form with my lawyer and agreed on a monthly payment plan."

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MASTER DOCUMENT OVERVIEW

- ☐ LAWYER RETAINER FORM
- ☐ SEPARATION AGREEMENT
- ☐ YOUR CLIENT HISTORY
- ☐ CO-HABITATION OR PRE-NUMPTIAL
- ☐ COMPLETE FINANCIAL STATEMENT
- ☐ CO-PARENTING PLAN
- ☐ TRAVEL DOCUMENTS AND RELATED CONSENT FORMS

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2. GATHER INFORMATION AND PREPARE A SEPARATION AGREEMENT

Description:

Compile the entire divorce agreement, including clauses on custody, access, child support, and spousal support.

Explanation and Strategies:

The separation agreement is a comprehensive document that outlines the terms of your divorce, covering critical aspects such as child custody arrangements, support obligations, and division of assets. To effectively prepare this agreement, collect all relevant information and documentation related to these areas. Collaborate closely with your lawyer to ensure that the agreement is fair, legally sound, and reflective of both parties' needs and intentions. Organize the agreement and any related amendments in your divorce folder for easy access and reference during legal consultations and negotiations.



COMPLETE

Comments:

e.g., "Drafted the separation agreement with my lawyer, focusing on equitable asset division and joint custody arrangements."

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3. COMPLETE YOUR CLIENT HISTORY FORM

Description:

Provide a comprehensive background of your marriage, including dates, duration, and personal details.

Explanation and Strategies:

The client history form is essential for your lawyer to understand the context and specifics of your marriage and divorce. This form typically includes information such as marriage and separation dates, names, addresses, and other pertinent personal details. Take the time to accurately and thoroughly fill out this form, ensuring all information is correct and complete. Providing a detailed history helps your legal team identify key issues, anticipate potential challenges, and tailor their approach to your unique situation. Keep the completed form organized within your divorce folder for future reference.

☐ COMPLETE

Comments:

e.g., "Filled out the client history form, detailing our marriage duration and key milestones."

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4. COLLECT PRE-NUMPTIAL OR CO-HABITATION AGREEMENTS

Description:

Gather any existing pre-nuptial or co-habitation agreements previously filed.

Explanation and Strategies:

Pre-nuptial and co-habitation agreements are legally binding documents that outline the division of assets and responsibilities in the event of a separation or divorce. If you have such agreements in place, it is crucial to locate and provide copies to your lawyer. These documents can significantly influence the terms of your divorce settlement by specifying how assets, debts, and other financial matters are to be handled. Ensure that these agreements are up-to-date and reflect your current circumstances. Organize all relevant agreements in your divorce folder to facilitate easy access during legal discussions.

☐ COMPLETE

Comments:

e.g., "Located our co-habitation agreement and shared it with my lawyer for review."

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5. COMPLETE A FINANCIAL STATEMENT

Description:

Develop a clear agenda before each meeting and adhere to it to maintain focus and efficiency.

Explanation and Strategies:

A comprehensive financial statement is pivotal in negotiating a fair division of assets and determining support obligations. This statement should include all sources of income, detailed lists of assets (such as property, investments, and personal belongings), and liabilities (including debts and loans). Use clear and organized tables or spreadsheets to present this information accurately. Collaborate with a financial advisor if necessary to ensure all financial aspects are thoroughly documented and transparent. Presenting a complete and honest financial statement enables your legal team to advocate effectively on your behalf and facilitates equitable negotiations.

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COMPLETE

Comments:

e.g., "Prepared a financial statement with my accountant, listing all assets and liabilities."

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6. DEVELOP A CO-PARENTING PLAN

Description:

Create guidelines for communication, decision-making, and custody arrangements for your children.

Explanation and Strategies:

The family parenting plan is a critical document that outlines how you and your ex-partner will co-parent your children post-divorce. This plan should cover various aspects, including custody schedules, visitation rights, decision-making responsibilities, and communication protocols. Consider the best interests of your children when developing this plan, ensuring it promotes their well-being and stability. Utilize templates or worksheets to organize your thoughts and discussions with your ex-partner. Collaborate with your lawyer to ensure that the parenting plan is comprehensive, clear, and legally enforceable. Include the finalized parenting plan in your divorce documentation for reference and implementation.

☐ COMPLETE

Comments:

e.g., "Drafted a parenting plan that includes alternating weekends and holiday schedules."

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7. OBTAIN TRAVEL DOCUMENTS AND CONSENT FORMS

Description:

Secure necessary travel documents and consent forms for single-parent travel with children.

Explanation and Strategies:

When one parent needs to travel with the children, especially internationally, obtaining the appropriate travel documents and consent forms is essential to avoid legal complications. These documents typically include notarized consent letters from the non-traveling parent, copies of children's passports, and any required visas. Begin this process well in advance of any planned travel to ensure all paperwork is in order. Consult with your lawyer to understand the specific requirements based on your travel destination and circumstances. Keep all travel-related documents organized and readily accessible to facilitate smooth travel arrangements.

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COMPLETE

Comments:

e.g., "Obtained notarized consent forms and updated the children's passports for our summer trip."

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FINAL THOUGHTS

Organizing your legal documentation is a fundamental step in the divorce process, laying the groundwork for informed decision-making and effective legal representation. By systematically gathering and preparing each essential document, you empower yourself to engage confidently with your legal team and navigate the complexities of divorce with clarity. A well-maintained legal folder not only streamlines your interactions with your lawyer but also ensures that all critical information is readily available when needed, reducing stress and enhancing the efficiency of your legal proceedings.

Taking the time to complete each action item diligently reflects your commitment to achieving a fair and equitable divorce settlement. It demonstrates to your legal team that you are proactive and organized, which can positively influence the negotiation process and outcomes. Additionally, maintaining comprehensive and accurate documentation supports your case, provides clarity during discussions, and minimizes the potential for misunderstandings or disputes.

As you continue through this section, remember to stay patient and compassionate with yourself. The process of gathering and organizing legal documents can be overwhelming but breaking it down into manageable steps makes it more attainable. Celebrate each completed task as a milestone towards securing a stable and positive future for yourself and your family. Should you encounter any obstacles, reach out for support from your legal team or a Divorce Coach, ensuring that you have the resources and guidance needed to successfully navigate this critical aspect of your divorce journey.

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