CHECKLIST OF SUPPORTING DOCUMENTS
TO BE FURNISHED BY CLIENT

NOTE: If you have problems obtaining the documents requested below, please advise us and we will obtain the information through subpoena.

_______ 1. Real Estate - Legal Description and Other Records. Secure a copy of the legal description for each parcel of real estate. You may be able to contact the lending institution which has a financial interest in the parcel of real estate and they will furnish you with the legal description. The legal description appears in the deed, mortgage, title insurance policy or abstract of title. We should have a copy of the deeds and other pertinent records for our file.

_______ 2. Receipted Real Estate Tax Bill. With respect to each parcel of real estate either jointly or solely owned, a copy of the last paid tax bill for each parcel of property.

_______ 3. Real Estate Appraisal. If any property has been appraised for any reason within the last three years, such as for insurance, mortgage loan or contemplation of sale, a copy of the appraisal.

_______ 4. Mineral, Oil, Gas Interests. Copy of the legal description for each such interest and any applicable royalty statements for the past three (3) years.

_______ 5. Business Interests. Copies of such partnership or corporate tax returns, and the appropriate schedules attached to such returns, as well as copies of the balance sheets and profit and loss statements for the last three years. You might find this difficult to obtain if you are not the spouse who has such controlling interest; but we would suggest that if it is not obtainable, please advise us and we will contact the necessary individuals to secure such information.

_______ 6. Securities, Stock Options. Documents such as statements, stock register, etc. for stocks or bonds owned, the date of the purchase, the purchase price, and the current owner of such securities. This information can be obtained directly from the person who handled the purchase of these securities for you or your spouse.

_______ 7. Bank Accounts. Copy of the current statement indicating the balance on deposit in all bank, savings and loan, or other financial institution accounts, and we must also receive three years of transactional statements for each account. Such information can be obtained from the financial institution by you upon request.

_______ 8. Retirement Plan. Please contact the bookkeeper, plan administrator, or person responsible for the maintenance of such program and request from them a copy of the summary plan description, a statement as to your current interest in such plan, and its monetary value. Rules/regulations regarding division of benefits and sample QDRO, if available. We would inform you that such information must be provided by your employer upon request.

_______ 9. Retirement Accounts. Name of the financial institution, account number, beneficiary and current statement indicating the balance in the account.

_______ 10. Monies Owed to You/Spouse. Instruments or other documents evidencing any notes receivable or other monies owed to you and/or your spouse.

_______ 11. Life Insurance. Copy of the declaration page or face sheet of all life insurance policies owned setting forth the name of the insurance company, face amount of the policy, policy number, owner of the policy, beneficiary, annual premium, and the terms and conditions of such policy.

_______ 12. Annuities. A copy of the current statement pertaining to any annuity.

_______ 13. Loan Documents. A copy of any loans (auto, bank or other) owed by you and/or your spouse.

_______ 14. Credit Card or other Account Statements. A copy of the current statements pertaining to any credit card, revolving credit or other accounts on which you and/or your spouse owe money and we must also receive three years of transactional statements for each account.

_______ 15. Judgments. A copy of any judgments on which you and/or your spouse owe money.

_______ 16. Contingent Assets or Liabilities. A copy of any documents relating to a claim or lawsuit filed by you or against you, or any other pertinent information.

_______ 17. Reimbursement Claim, Equitable Interest or Equitable Contribution. A copy of any evidence relating to these claims.

_______ 18. Tax Returns & Forms. Copies of your (and your spouse's) state and federal income tax returns for the last three years, including all schedules, W-2 forms, and 1099's.

_______ 19. Pay Stubs. Copies of your pay stubs (and your spouse's) for the last three months.

_______ 20. Other Income Information. Copies of other income information, such as bonuses, worker's comp benefits being received, Social Security benefits, disability, rental income, etc.

_______ 21. Net Worth Statements. If you have been required to file any financial or net worth statements in the last five years for the purpose of securing a loan or line of credit, copies of such financial or net worth statements. If you do not have a copy in your possession, contact the financial institution to which you submitted these statements and obtain copies from them.

_______ 22. Medical Insurance. Company name, address, policy or group number, and subscriber number for all health and medical insurance. Also secure from the insurance company a statement as to the coverage for the spouse and children and what provisions the policy has concerning conversion after divorce.

_______ 23. Other Insurance. Copies of all insurance policies you presently maintain, including, but not limited to, all homeowners policies, automobile, and personal property insurance, including any schedules or riders.

_______ 24. Estate or Trust Interests. Copy of the Will, inventory, final account and judgment affecting such interest. If you have an interest in any trust, it is important for us to review the actual trust agreement, the inventory, most recent annual accounting, and tax returns, if any, for such trust. We would suggest that you provide us with such documentation for the last three years. Please be sure to furnish whatever information you have with respect to your spouse's interest in any estate, trust, or future interests.

_______ 25. Previous Marriages. Copies of the decrees/ judgments entered in any such action relating to you or your spouse.

_______ 26. Wills. Copies of the Wills of you or your spouse.

_______ 27. Written Agreements - If you and your spouse have entered into any written agreement concerning support, property, or other matters, a copy of the agreement. **If there is no agreement, under no circumstances should you enter into any agreement with respect to these proceedings or otherwise without consultation with this office.**

_______ 28. Health Insurance. Please obtain at least three (3) quotes for health insurance which will terminate due to divorce for coverage comparable to what you presently have.

_______ 29. Life Insurance. If life insurance may be necessary to meet child/spousal support obligations, please obtain at least three (3) quotes for coverage in the amount of $250,000.00.

_______ 30. Other Proceedings. A copy of any judgments, decrees or pleadings relating to litigation or other proceedings affecting the visitation or custody of the children.

_______ 31. Medical, Psychological or Counseling Records. A copy of such records that relate to the children.

_______ 32. Police Reports. Please provide police reports of spouse or child abuse, if any.