

DIVORCE MEDIATION CHECKLIST

The following documents and other information will help your divorce mediator advise you regarding your divorce. Getting these documents together early in the divorce process will help you to better navigate your divorce in the most cost-effective manner. This list is for your records. Feel free to print the form out and check off items as you collect them.

- o Contact information for you and your spouse.
- o Tax returns for the past three years (federal and state)
- o Business tax returns for the past three years (federal and state)
- o Information regarding your current income (W-2 forms, 1099 forms, K-1s, recent paystubs)
- o Information regarding your spouse's income (W-2 forms, 1099 forms, K-1s, recent paystubs)
- o Bank statements, both checking and savings
- o Prenuptial or post-marital agreements, if any.
- o List of *assets* you own, including most recent statements for anything on the list.
- o List of *debts* you owe, including most recent statements for anything on the list.
 - Mortgage statements ▪ Card Statements ▪ Auto loans ▪ Personal loans
- o List of debts you co-signed for, including most recent statements.
- o List of assets in your children's names, including most recent statements for each. (bank accounts, brokerage statements, etc.)
- o Health Insurance Information, including current policy coverage and costs.
- o Life insurance held by either party. Include copies of policies and statements.
- o Documentation regarding retirement plans for you and your spouse (401k, pension plan, IRA statements, etc.)
- o Documentation regarding stock options and restricted stock, including vesting schedules)
- o Real property valuations documents (appraisal, market analysis, etc.)
- o List of contents of safe deposit boxes or safes.
- o List of automobiles you own and valuation information from Kelly Blue Book (www.kbb.com). This includes campers, trailers, ATV's, motorcycles, etc.)
- o Details of any degrees and/or licenses held by each spouse.
- o Details of future Social Security benefits for each spouse.
- o Business financial statements (profit and loss statements & balances sheets) for the past three years.
- o Loan application forms for loans taken out within the past three years.
- o List separate assets claimed for each spouse.
- o Titles and deeds to all property owned.