DIVORCE HELP CPA

Divorce Help CPA
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DOCUMENT LIST

Below is a list of documents (to the extent that they apply) that you and your spouse will need to provide in order to perform any divorce planning. A DropBox link to a shared, secure folder will be provided or you can scan and email as long as you use encryption or password protection on sensitive data. While this is a general list of documents needed, there is a good chance we will need to request additional documentation once we become familiar with your specific situation.

- Fully Completed "Financial Information" Packet
- Last 3 years of tax returns with all supporting schedules and W-2s
- Most recent 3 months of pay stubs from each employer
- Most recent statements from any employee retirement plan, pension or deferred compensation plan
- Most recent statement on any Employee Stock Option, Employee Stock Purchase Plan, Stock Award or Restricted Stock accounts
- Most recent statement on any investment accounts
- Most recent statements for all bank accounts, checking, savings and MMDA accounts
- Most recent mortgage statement(s) – primary, investment and rental properties
- Last 3 monthly statements for all credit cards with balances (not paid in full each month)
- Most recent statement for any other outstanding loans
- Policy statements or information on any, and all Life Insurance, Annuities, or Cash Value Insurance
- Most recent insurance policy for all autos owned that show VIN numbers. Write current mileage on vehicle policy page
- For any business owned, a full Profit & Loss Statement and Balance Sheet for current and previous 2 years
- Social Security Estimate statements for both parties if either is over the age of 45. These are available at www.SSA.gov.
- If financial Affidavits have already been completed, please provide a copy.