



Divorce Preparation Checklist

Items to gather

- Social security numbers for you, your spouse, and your children (this information is necessary to file a divorce action)
- Recent paycheck stubs for you and your spouse
- Social Security earnings statements for self and spouse
- Tax returns (including attachments) for the previous three years
- Statements for retirement, investment, and other asset accounts
- Plan summaries or cover pages (showing owner, beneficiary, face value and cash value) for life insurance policies
- Statements for all debts
- Recent bank account and credit card statements showing transactional history
- Net worth statement for self, spouse, or family, if you have one
- Private party Kelly Blue Book value for each vehicle
- Any appraisals or closing statements for real estate owned by you and/or your spouse
- Copies of trust documents (if you are the beneficiary of a trust)
- Copies of your Marital Property Agreement(s) (prenuptial and postnuptial, if applicable)
- Copies of travel schedules and/or rotating work schedules for you and/or your spouse

Please be aware that this not an exhaustive list, nor are all items on this list necessary to start a divorce action, but beginning to gather these items may be helpful if you choose to pursue an action for divorce or separation action. We recognize that not all clients come to the table with confidence regarding their family finances and we are here to help you learn everything that's needed to make the best financial decisions as you move through this process.

Considerations

- If you decide to file, who will need to know prior to filing?
- What will the living arrangements be when you file?
- How will you and your spouse talk with the children about this decision?
- Will you and your spouse file jointly or would you prefer to file the action independently?

These are just a few initial considerations. Most people come to their initial consultations with many questions and we will take the time necessary to provide answers and discuss various options for filing and moving through the divorce or separation process.