

## Divorce financial checklist

Following is a list of documents and information you'll need to collect in order to help the process go smoother — ideally prior to meeting with your divorce attorney for the first time.

### Proof of income for both parties

- Paystubs for the last six months
- Income tax returns for the past 3-5 years
- The previous year's W-2
- Social security statements

### Records of assets

- Title for cars, boats or other vehicles
- Account statements for checking/savings, mutual fund and money market accounts
- Personal property appraisals
- Real estate records and deeds
- Stocks, bonds and annuities statements
- Retirement plan records
- Profit sharing plan records
- Medical savings account records

- Life, health, homeowner's and automobile insurance policies
- Trust records
- Business and self-employment records such as tax returns, agreements and financial statements
- List of personal property
- List of property owned by each person prior to the marriage

### Debt records

- Credit card statements
- Vehicle loan information
- Mortgages and home equity loan statements
- Statements for student loans, medical bills and tax liens
- Credit reports
- Loan applications
- Utility bills

### Legal documents

- Separation agreement
- Wills or Living Wills
- Pre- or postnuptial agreements
- Powers of Attorney
- Durable Powers of Attorney
- Estate planning documents
- Proof of inheritance or ownership of an asset prior to the marriage
- Advance Health Care Directives

Use this checklist as a guide and check with your other professional advisers for direction on your specific tax or legal situation. **Badgley Phelps is not an insurance, tax or legal adviser.**