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.