

# Don't Leave Home Without These

- All Checking, Savings, Money Market or CD Bank Account Statements
- All Annuity, Stock, Mutual Fund, IRA, 401(k), 403(b), 457, or Retirement & Investment Statements Owned Individually, Joint, Custodian, Business or Signer.
- Life Insurance Statements
- Copies of Life Insurance, Disability Insurance, Health Insurance, Homeowners/Renters Insurance & Liability Insurance Policy Including the Copy of the Application in the Back of the Policy.
- Previous or Current Financial Plans
- Financial Statements Prepared By Other Professionals, Bank or Lender
- Credit Card Statements
- Copies of all Mortgage & Loan Documents for Marital Residence, Rental Property , Vacation Property, Time Share , Investment Property , Personal Loans, CD Loans, etc.
- Any & All Appraisals on Real Estate, Property or Other Valuables Including Coins, Gold, Silver, Stamps, Antiques, etc.
- Cell Phone Records Showing Numbers Called
- Year End Paystubs & Complete Year Leading up to Date of Divorce Filing
- Pension Statements
- Benefit Booklets from Current & Past Employers
- Employee Benefits Showing Auto Allowances, Bonuses, Deferred Compensation, Expense Accounts, Insurance Premiums Paid, Sick Pay, Vacation Pay, Travel Benefits, Stock Options or Any Other Employee Benefit
- Social Security Statement
- Current Credit report
- Five Year of Tax Returns For Federal & State Including all Attachments Especially AllW-2's, 1099's, K-1's, Mortgage Interest, Charitable Deductions & Any Document Showing Investment Proceeds
- An inventory of Valuables, Vehicles, Motorcycle, Aircraft & Other Marital Purchases
- Copies of important records and correspondence from your home PC
- All Handwritten Notes Pertaining to Finances
- Pre & Post Nuptial Agreements
- Previous Divorce Documents including Property Settlement
- Written Agreements With Partners or Employers
- Inventory of Safe Deposit Box Contents
- Statements or Documents Showing Non Marital Property, Inheritances, Gifts, etc