Financial Divorce Checklist

Documents for your lawyer and financial advisor

- [ ] Income tax returns for at least the last three years (federal, state and local)
- [ ] Proof of both spouses' income (w-2 and 1099 forms)
- [ ] Statements of any financial accounts, including checking and savings accounts, certificates of deposit, mutual funds and money market accounts
- [ ] Records of credit cards (six months)
- [ ] Loan information: mortgages and home equity loans, student loans, vehicle loans
- [ ] All real estate records
- [ ] Personal property, such as automobiles, furnishings, collections (e.g. art, stamp, coin)
- [ ] Medical savings accounts
- [ ] Life insurance policies, trusts
- [ ] Stocks, bonds, annuities, retirement plans, particularly pensions and profit-sharing plans