
Document Checklist

There is a list of documents you will want to provide to your lawyer when your divorce case begins. Now, while you have access to these documents, gather them. Again, we cannot emphasize enough just how difficult the documents may be to gather once the divorce case begins.

- _____ Individual income tax returns for past three to five years (federal, state, and local)
- _____ Business income tax returns for past three to five years (federal, state, and local)
- _____ Proof of your current income
- _____ Proof of spouse's current income
- _____ Prenuptial agreement
- _____ Separation agreement
- _____ Bank statements
- _____ Certificates of deposit
- _____ Pension statements
- _____ Retirement account statements
- _____ Trusts
- _____ Stock portfolios
- _____ Stock options
- _____ Mortgages
- _____ Property tax statements
- _____ Credit card statements
- _____ Loan documents
- _____ Utility bills
- _____ Other bills (e.g., school tuition, unreimbursed medical bills, music lessons for children, etc.)
- _____ Monthly budget worksheet
- _____ Completed financial statements
- _____ Employment contracts
- _____ Benefits statements
- _____ Life insurance policies
- _____ Health insurance policies
- _____ Homeowner's insurance policies
- _____ Automobile insurance policies
- _____ Personal property appraisals
- _____ Real property appraisals
- _____ List of personal property, including home furnishings, jewelry, artwork, computers, home office equipment, clothing and furs, etc.
- _____ List of property owned by each spouse prior to marriage
- _____ List of property acquired by each spouse individually by gift or inheritance during the marriage
- _____ List of contents of safety deposit boxes
- _____ Wills
- _____ Living Wills
- _____ Powers of Attorney
- _____ Durable Powers of Attorney
- _____ Advance Health Care Directives