Documents Checklist for Divorce Financial Planning

Please provide the following items in order to proceed with the planning process. If you have completed a Financial Affidavit you may submit that as a substitute for some of what is requested below.

1. A recent pay stub for each job (client and co-client.)
2. A copy of your most recent tax return including schedules and W-2s.
3. Current values for all assets: bank, money market, investment, mutual fund, company retirement plans, IRAs, Roth IRAs, profit sharing, deferred compensation, etc.
4. An explanation of (or formula for) the employer match to your company retirement plans
5. Copies of Declarations Page(s) (the page with coverage and premium details) for all life and disability insurance policies
6. Current pension valuation (if applicable).
7. Social Security Benefits Estimate statements.
8. A Stock Option Summary Statement if you own company stock options.
9. Cash Flow Statement
10. Any other documents you think may be helpful in assessing your situation.

Credit Card information:

Credit Card Issuer	**Interest Rate**	**Current Balance**	**Monthly Payment**

Other loan information:

Loan Description (mortgage, home equity line, auto, student, etc)	Current Balance	Inception	Initial Amount	Interest Rate	Loan Term	Monthly Payment