



Documents Checklist:

1. ☐ Driver's License

Please provide the following income documentation for both parties:

2. ☐ Tax returns for the past 2 years
3. ☐ Income verification for ALL income for the past 2 months (*examples: paystubs, profit and loss statements for business owners, rental income, retirement income, government assistance, etc.*)

Please provide documentation for every asset and debt for both parties (*all statements should cover the **Date of Separation**, not necessarily the most recent statement*):

4. For all vehicles, boats, trailers, campers, etc., we need a copy of:
☐ Title OR loan statement
5. For all financial accounts (*checking, savings, credit unions, etc.*), we need a copy of:
☐ Statement
6. For all investments (*stocks, bonds, mutual funds, securities*), we need a copy of:
☐ Statement
☐ Form 1099 (*you should get this before tax season every year*)
7. For all debts (*credit cards, loans, student loans*), we need a copy of:
☐ Statement OR the original loan documents
8. For all life insurance policies, we need a copy of:
9. ☐ Statement
☐ Policy Declaration Documents
10. For all retirement accounts, we need a copy of:
☐ Statement
(*for ALL profit sharing, annuities, 401(k), deferred compensation plans, ESOP plans, IRA, Roth IRA, or any other retirement account regardless of vesting status*)
11. If you own a home(s) or other real estate, we need a copy of:
☐ Deed
☐ Mortgage Statement (*including any second mortgages*)
12. If you owe child/spousal support arrears, we need a copy of:
☐ Support order
☐ Statement of arrears owing
13. If you are a business owner, we need a copy of:
☐ Profit & Loss Statement
☐ Statement of Accounts Receivable
☐ Balance Sheet (*showing all assets/debts of the business*)