



Divorce Financial Checklist

Use this list to direct you to the documents you'll pull together to share with your lawyer or mediator and financial advisor.

Assets

- Real Estate - Deed, Mortgage, Second Mortgage, Lines of Credit
 - Vehicles – Ownership, loans outstanding
 - Investments – Recent statements for bank accounts, savings accounts, mutual funds, brokerage accounts, annuities, include all “Specialized Savings” like college funds, retirement, UGMA/UTMA accounts
 - Employer Plans – Recent statements, include retirement plans, profit sharing and incentive plans
-

Liabilities

- Outstanding credit card debt, school loans, medical debt – any debt other than home and car loans
 - School loans
 - Medical debt
 - Any additional debt other than home and car loans
-

Insurance

- Life insurance policies for each spouse, include life insurance through employers
 - Current health insurance, costs and coverage
-

Income

- Paychecks for each spouse
 - Tax filing for the past two years
 - Any other income
-

Estate Plans

- Wills
- Any existing trusts you have created as a family
- Powers of Attorney for Health Care, Finance, or General

