

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.

**ASSETS AND LIABILITIES:**

1. A current statement for each Asset and Liability
2. A Stock Option Summary Statement if you own company stock options.
3. An explanation of (or formula for) the employer match to your company retirement plans.
4. Purchase price and date of home
5. Estimate of improvements made in home while owned

**CASH FLOW:**

1. A recent pay stub for each job
2. Cash Flow Statement (all expenses for the past 12 months).
3. Last 2 years tax returns, complete with all attachments (including schedules and  
    W-2s).

**EMPLOYEE BENEFITS:**

1. Employee benefits booklet
2. Current pension estimate including estimates with all possible survivor options.
   1. The date you started employment with the company and the date you left (if applicable)
3. Cost of current employer-paid health insurance, and cost for the employee only, and employee and children (without spouse).
4. Accrued vacation, sick leave or other time
5. List of business expenses paid by employer
6. Veterans or military benefits statements

**OTHER:**

1. Last 2 years of tax returns for any business interest
2. Social Security Benefits Estimate statements
3. Current statement or record of any asset/gift which you consider to be separate property
4. Statements for frequent flyer miles and other rewards
5. Value of seasons tickets

**INSURANCE:**

1. Copies of Declarations Page(s) (the page with coverage and premium details) for all life and disability insurance policies

**CHILDREN’S ACCOUNTS:**

1. Copies of recent statements for any college plan accounts