

## Divorce Document Checklist

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### **Taxes**

#### **Returns**

- ☐ From last year
- ☐ Federal tax return
- ☐ State tax return
- ☐ W2
- ☐ 1099
- ☐ Schedule K-1

#### **Statements**

- ☐ Social Security (visit [ssa.gov](https://ssa.gov) for your benefit statement)

### **Debts & Loans**

#### **Mortgage Statements**

- ☐ Primary
- ☐ Secondary

#### **Credit Cards**

- ☐ Most recent statement

#### **Loan Statements**

- ☐ Transportation
- ☐ Student
- ☐ Personal
- ☐ Other

## **Income**

- ☐ Paycheck stub (3 pay periods)
- ☐ 1099s
- ☐ Social Security income statement
- ☐ Disability statement
- ☐ Pension statement
- ☐ Other

## **What You Own**

### **Investment Account Statements**

- ☐ IRA/Roth IRA
- ☐ Annuity
- ☐ Workplace savings plan (401(k), 403(b))
- ☐ Stock options (need documents)
- ☐ 529 Plan
- ☐ Brokerage accounts
- ☐ Other
  - Crypto
  - CD's
  - Stock certificates

### **Trust Documents**

- ☐ Revocable living
- ☐ Irrevocable
- ☐ Charitable
- ☐ Other

### **Documents can be forwarded via:**

- Email (PDF) – All email is encrypted
- Mail (USPS, UPS, FedEx)
- Drop Box
- Drop off at our office