

Divorce Checklist

FINANCIAL PLANNING

This checklist was developed to simplify your life by providing you with a list of items for you to complete if you are contemplating divorce. We will help you through this list to accomplish the necessary items relevant to your situation. In addition, your attorney and tax advisor will be crucial through this time.

COLLECT INFORMATION <i>(for you and your spouse)</i>	DONE	NOTES
Financial statement and investment details	✓	
Income tax returns (3 years)		
Employment pay-stubs, benefit, and retirement information		
Home assessment, mortgage, and escrow information		
List of assets and liabilities (vehicle, personal loans)		
Inventory of personal property		
Inventory of non-marital property		
Bank/credit union and credit card statements (3 months)		
Insurance information (life, disability, property, and casualty, health)		
Any other documents that would have a bearing on your financial situation		
DOCUMENT PRIORITIES <i>(for you and your spouse)</i>		
Child support, custody, and visitation		
Financial support to maintain a similar lifestyle		
Division of retirement, assets, and debt obligations		
Division of property of household assets		
Wellbeing to maintain a certain level of normalcy		
Potential areas of contention		
DOCUMENT INCOME AND EXPENSES <i>(average and projected monthly and annually)</i>		
Home (electricity, gas, water, trash, landscaping, repairs)		
Food (restaurant, grocery)		
Entertainment (vacation, hobbies, movies, memberships)		
Medical (physical, dental, orthodontist, therapist, chiropractor, prescriptions)		
Insurance (life, health, dental, disability, home, auto)		
Transportation (payment, fuel, repairs, maintenance, parking, license)		
Personal (clothing, haircut, laundry, toiletries, gifts, charity)		
Miscellaneous (pets, education, books, etc)		