



Financial Checklist When Filing for Divorce

Tax Returns

- Last **three (3) years** of filed tax returns for both parties

Income Documentation

- Last **three (3) paystubs** for both parties

Real Property

- Deeds
- Mortgage statements for all real property

Bank Accounts

- Bank statements
- Account numbers for all financial institutions (both parties)

Retirement Accounts

- 401(k)
- IRA / Roth IRA
- 403(b)
- Any other retirement accounts (both parties)

Debts & Credit

- Credit card statements
- Loan statements
- Any other outstanding debts (both parties)



Insurance Policies

- Health
- Dental
- Auto
- Home
- Any additional policies

Business Interests

- Business organization documents
- Financial statements (P&L, balance sheets, etc.)

Investments

- Brokerage account statements
- Stocks, bonds, or other investment accounts

Vehicles

- Vehicle Identification Numbers (VINs)
- Titles
- Loan statements