

The checklist

Document types to have in one known place. Your attorney sets the list for your case.

- ☐ Recent pay stubs
- ☐ Federal and state tax returns, with schedules
- ☐ Bonus, commission, and stock award records
- ☐ Social Security, disability, and pension benefit statements
- ☐ Money market and certificate of deposit statements
- ☐ Cryptocurrency exchange and wallet records
- ☐ Mortgage and home equity loan statements
- ☐ Student loan statements
- ☐ Tax notices and balances owed
- ☐ Closing statements, purchases and sales
- ☐ Vehicle, boat, and trailer titles
- ☐ Business formation and ownership records
- ☐ Leases
- ☐ Postnuptial agreement
- ☐ Pre-marriage account statements
- ☐ Inheritance and probate papers
- ☐ W-2 and 1099 forms
- ☐ Business tax returns and profit-and-loss statements
- ☐ Rental income records
- ☐ Checking and savings statements
- ☐ Brokerage and investment statements
- ☐ Credit card statements, every card
- ☐ Car, boat, and personal loan statements
- ☐ Personal guarantees on business loans
- ☐ Deeds
- ☐ Property tax and homeowners association statements
- ☐ Appraisals of jewelry, art, and collections
- ☐ Operating, shareholder, and partnership agreements
- ☐ Prenuptial agreement, with exhibits
- ☐ Earlier divorce decree and settlement
- ☐ Pre-marriage purchase and title records
- ☐ Trust documents and trust statements

- ☐ Records of gifts received
- ☐ Life insurance policies and beneficiary designations
- ☐ 401(k), IRA, and pension statements
- ☐ Birth certificates, yours and your children's
- ☐ Passports
- ☐ Driver's licenses
- ☐ Wills and powers of attorney
- ☐ Health, auto, and homeowners policies
- ☐ Retirement plan summary documents
- ☐ Marriage certificate
- ☐ Social Security cards

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