



CHASE LAW

DIVORCE/SEPARATION INFORMATION CHECKLIST

- _____ Current contact information
- _____ Personal information for you and your spouse (names, dates of birth, date of marriage, date of separation, names and ages of children from this marriage and from other relationships)
- _____ Individual income tax returns for past three years (Fed/State)
- _____ Business income tax returns for past three years (Fed/State)
- _____ Information regarding your current income (W-2, 1099, recent paystubs), government or disability benefits
- _____ Information regarding your spouse's current income (W-2, 1099, recent paystubs), government or disability benefits
- _____ Prenuptial or post-marital agreements, if any
- _____ List of any income sources not detailed above and pertinent details (personal loans you hold, debts others may owe you, etc.)
- _____ Include any sources of future income you are expecting
- _____ List of assets you own, including most recent statements for anything on the list (e.g., bank account statements, brokerage statements, etc.) Include any liquid assets such as coin, baseball cards, jewelry, antiques, etc.
- _____ Include the basis for your home as well as any non-retirement assets
- _____ If the accounts were open before the marriage, include the balances at the time of the marriage
- _____ Separate property (pre-marital), inheritances, personal injury awards. List of

separate assets claimed for each spouse

_____ List of assets in your children's name(s), including most recent statements for anything on the list (bank account, brokerage statements)

_____ List of debts you owe, including most recent statements for anything on the list (mortgage statements, credit card statements, auto loans, personal loans)
Include any debts that are in collection and details of any past bankruptcies (if applicable)

_____ List of debts you co-signed for, including most recent statement for anything on the list (student loans, auto loans, or mortgage statements)

_____ Documentation regarding retirement plans for you and your spouse (401(k) statements, pension plan documents, IRA statements, etc.)

_____ Documentation regarding stock options and restricted stock, including vesting schedules

_____ Health insurance information, including current policy coverage and costs

_____ Life insurance held by either party. Include copies of policies and statements

_____ Real property valuation documents (appraisal, market analysis) List of contents of safe deposit boxes or safes (including locations)

_____ List of all vehicles you own and valuation information from Kelley Blue Book

_____ Business financial statements (profit and loss statements, balance sheets) for past three (3) years, if applicable

_____ Loans taken out within the past three years

_____ Details of any degrees and/or licenses held by each spouse