

Financial Document Checklist

Copies of the following documents will be required to complete the financial portion of your divorce/dissolution. Generally, we begin with your Parenting Plan document to give you time to collect the following information and determine your date of separation, the date on which your resources have or will be legally separated. However, please begin collecting them right away, as some documents may take extra time to acquire. Full disclosure of all financial information is required by law, and your child support and/or property settlement agreements cannot be completed without them.

Child Support Agreement

- Prior year tax return with schedules
- Prior year W-2 forms for each
- 3 most current pay stubs for each
- Verification of other income: public assistance, unemployment, or other
- Verification of health insurance; cost of children's portion only. You may need to call your benefits department or insurance company to get the children's portion.
- Documentation of your life insurance: death benefit amount, monthly cost to you.

Property Settlement

The following documents must be current as of the date you select as your **date of separation**. If you have already separated your financial assets, your date of separation may be a date in the past, after which any income or debt will be considered non marital. Or you may select a date during the dissolution process. We'll discuss options at your first joint session.

- Copies of bank statements, all accounts in either/both names
- Copies of charge card statements in either/both names
- Copies of retirement account statements, pensions, and pension loans, all accounts in either/both names
- Copy of mortgage statements, first, second, and lines of credit
- Homes, other real estate or land - Written realtor market analysis with a minimum of 3 comparables or Appraisals of property owned
- Blue Book value on cars, boats, airplanes, etc.
- Loan statements/lease agreements on the items listed above

Hall Mediation Services

- Profit/Loss statements & tax returns for businesses owned: sole proprietorships, partnerships, corporations.
- Copies of statements for any other money either of you owe, or assets that either of you own.
- Your expected budget after separation.