



Divorce Checklist: My Finances

- Paystubs
- Tax Returns, including W-2, 1099, and K-1 forms for the last 3 years
- Bank statements for last 3 years
- Additional income documentation related to investment property, rental/lease agreements, dividends, interest, royalties, lottery winnings, etc
- Employment benefit and health insurance information
- Brokerage statements, stocks, bonds, and mutual funds
- Retirement account statements, including pension, 401(k), 403(b), 412(e)(3), 457, military, IRA, Roth IRA, SEP-IRA, Keogh, etc. for last 3 years
- Estate planning documents including wills and trust agreements, and any powers of attorney
- Life insurance policies
- General insurance policies, including property, health, accident, disability, casualty, motor vehicle, and property
- Business documents, such as partnership agreements, tax returns, and related financial statements.
- Copies of any loan or mortgage application made within the last 3 years