



WHAT TO GATHER



GATHERING YOUR INFO

Divorce is a full time job and is filled with a million details that need your attention. That's why being well prepared is really important. You've got more than enough on your plate, so having everything you need easily accessible when you're meeting with legal professionals is a game changer!

Not only will you be able to speak with specificity about your accounts, you'll be in a position to have your attorney or mediator start the process ASAP, and alleviate the need for them to nag you for stuff because you've already done your homework.



WHERE TO KEEP YOUR INFO

How and where you keep your statements and documents is completely up to you. If you're someone who likes to have physical copies of paperwork you can copy or print out statements and documents and put them into a folder or a binder.

If digital is your preference then upload everything to your computer or create a Cloud account (like Google Drive, Dropbox, etc.) and save everything there.

No matter what method you choose your information will be easy to access and share moving forward.

That's a big win!

And now, "THE LIST"...



THE LIST

PAST 5 YEARS OF TAX RETURNS (Personal & Business)

PRO TIP - Make sure you copy the first few pages per tax year.

<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	

PAST 12 MONTHS OF CREDIT CARD STATEMENTS

PRO TIP - Include the annual spending report for each card. Don't forget credit card points.

<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____

PAST 12 MONTHS OF BANK STATEMENTS

<input type="checkbox"/> Checking Accounts	<input type="checkbox"/> Pensions
<input type="checkbox"/> Savings Accounts	<input type="checkbox"/> 529's or other College Accounts
<input type="checkbox"/> SEP IRA's	<input type="checkbox"/> Joint & Individual Accounts
<input type="checkbox"/> 401K's	

PAST 12 MONTHS OF MORTGAGE AND/OR RENT PAYMENTS

PRO TIP - If you're paying a mortgage, remember to include the annual property tax statement. Don't forget to do the same for additional residences.

CURRENT DEBT INFORMATION

(Medical, Car Loan, Student Loan, Etc.)

<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____

DEPENDENT EXPENSES

Pro Tip - Include school tuition & donations, sports fees, extracurricular classes, camps, therapy, childcare, tutoring, medical/dental, etc. (Reminder: Dependents can be kids or seniors)

<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____

ESTATE PLANNING DOCUMENTS

<input type="checkbox"/> Wills or Living Will Documents	<input type="checkbox"/> Certification of Trust (not entire Trust doc)
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What To Do If Your **Spouse Handles** **The Accounts &** **Statements**

It's common for one person to be in charge of the bills and documents during your married life. If you find yourself in that situation you'll have to put your detective hat on and get to work. Look through any and all mail that comes in and make copies or scan what you need.

If you don't have access to your tax returns you can reach out to your tax preparer and ask for copies, or request them through the IRS.

If it's possible to start the information gathering process BEFORE you separate, do it.

Attitudes and communication can change over the course of divorce, so taking action sooner than later is your best bet.

If you can't get access to everything don't worry. Keep an ongoing list of what you don't have that you can share with your attorney or mediator. They'll be able to take it from there.

WHAT I DON'T HAVE

THE **DIVORCE** PLANNER