

DOCUMENT CHECKLIST

NAME:			DATE:
Please return the following documents to our office. Mark the appropriate column – ATTACHED, SPOUSE (if in spouse's possession), or N/A if not applicable.			
ATTACHED	SPOUSE	N/A	
			Current photograph of your spouse
		- :	2. Your paycheck stubs, and your spouse's paycheck stubs, if you can obtain them, for the past 12 months.
		 ;	3. Copies of income tax returns, both state and federal, for the last 3 years.
			4. If you and/or your spouse is self-employed, corporate, partnership tax returns for the last three years.
		!	 If you and/or your spouse is self-employed, copies of financial statements, profit and loss statements, partnership agreements, corporate documents, bank statements, accounts payable and receivable, etc.
			6. Deeds showing description of your home and any other real property owned by you or your spouse.
		 .	7. Mortgage statements reflecting the balance at date of separation and the current balance on your home, and any other real property owned by you or your spouse.
		;	B. Escrow papers from time of purchase or time of sale of any real property owned by you and/or your spouse
		!	 Appraisal reports, real property tax statements, homeowner insurance policies, tax assessors statements on all real properties
		 .	10. Pink slips and/or registration slips to all vehicles, boats, trailers, airplanes, etc., owned by the parties
		 	 Statements reflecting the balance at date of separation and the current balance for any vehicles, boats, trailers, airplanes, etc.
	-	· · · · · · · · · · · · · · · · · · ·	12. Statements for any bank accounts reflecting the balance at date of separation and the current balance
		-	13. Life insurance or annuity policies with statement of cash surrender values and loans against same.
	-	-	14. All records pertaining to stock options held in any corporation or other entity, exercised or not exercised.
-		.	15. Brokerage statements and stock/bond certificates reflecting the balance at date of separation and the current balance
-		.	16. Statements and plan booklets regarding any pension, retirement programs, or investment programs you or your spouse may be involved in through current or past employment.
		. .	17. Financial statements and statements of net worth prepared for securing bank loans or for any other purpose.
		. .	18. Prepare an inventory of the contents and the location and number of any safe deposit box(es).
			19. Promissory notes regarding monies you and/or your spouse owe to another person or entity.

Promissory notes regarding monies owed to you and/or your spouse by another person or entity.
Statements for any debts owed by you and/or your spouse, reflecting the balance at date of separation and the current balance, including credit cards, student loans, bank loans, car loans, life insurance loans, personal loans.
Loan applications and statements of loan accounts for all loans applied for, whether approved or not, for the period of the last 3 years.
Any budgets or other written documents showing current monthly expenses including check registers or bank statements for account used for paying bills.
Documents indicating possible misuses of community property, for example, gambling, hidden assets, or money or gifts to another person.
All written agreements with spouse entered into before, during, or after separation.
Copies of any wills and trust agreements
If you have a separate property interest in a community asset or a reimbursement issue (for instance if you used separate property funds to purchase a home or other asset during your marriage), please provide a brief explanation of any such transaction and provide documentation relating to your separate property investment.
If you are unemployed because of a disability, please provide any medical reports stating that you are unable to work.
Any other documents which you believe relate to your income, assets or debts.