

Divorce Financial Checklist

A holistic look at your entire marital picture during divorce is essential. Below is a list of many of the documents you will need as you go through the divorce process. A comprehensive understanding of your financial worth is critical so you can negotiate the best outcome for your future.

Asset and Account Information

- Last 12 months of statements for all accounts – checking, savings, credit, investment, & retirement accounts
- Retirement account statements – IRAs, 401(k)s, pensions, early retirement benefits
- Accounts for children – bank accounts, trusts, 529 plans
- Life and disability insurance policies and beneficiary information
- Homeowner and auto insurance policies
- Last five years of year-end paystub statements for you and your spouse
- Federal and State tax returns for the past 5 years, include W-2 forms
- Corporate and Partnership tax returns for you and your spouse for the last five years
- Financial statements prepared for you, your spouse, or a business entity in which either of you have an interest
- All debt - student loans, mortgages, credit cards, lines of credit
- Crypto currency account information
- Frequent flyer miles and credit card points

Legal Documents

- Prenuptial and postnuptial agreements
- Intellectual property information

Information to know

- Annual salaries for you and your spouse
- Spouse's employment benefits
- Social Security Statements
- Inheritance details for either spouse and amounts
- Monthly budget (living expenses, health insurance, etc.)
- Lifestyle expenses (tuition, vacations, etc.)

Estate Planning

- Wills and Living Will documents
- Certification of Trusts
- Power of Attorney Documents
- Advance Healthcare Directives

If you're self-employed:

- Financial statements or profit and loss statements for the past five years

- Business tax returns for the past five years
- Buy-sell agreement or other agreement concerning valuation of business
- Any loan application prepared within the past five years
- Any existing appraisal of the business.

Real Estate

- Copies of all Deeds with a description to show how each title is held
- Appraisals on any real property if dated within the last two years
- Final escrow statements or settlement statements for purchase or sale of property
- Cost basis of home: purchase price + improvements
- Mortgage statements showing payments, balance, original loan amount, length of loan and interest rate
- Records of all rental property and cost basis
- Records of all vacation property and cost basis
- Tax Assessor's Statement

Personal Property

- Appraisals, insurance information and receipts for anything valuable such as jewelry, fine art
- Custody of pets
- Livestock (horses, cattle, etc.)
- Property owned by each spouse before marriage
- Property acquired while married
- Vehicles, boats, RVs, airplanes- copy of registration, loan information, Kelley Blue Book valuations
- Contents of safety deposit boxes and keys

Your Financial Advisor's Information

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