



DOCUMENT LIST

As we begin to work together, the assistance I can provide is directly dependent on you. I can only provide a thorough analysis if I have all the information necessary to do so. Below is a list of documents that you and your spouse will need to provide as soon as possible. Scan and upload to your Dropbox folder. It's not necessary to send everything at once. If it's easier to do a little at a time, that's fine.

Please upload only pdf files (not jpg) using a naming convention such as

Acct name Acct #, Date (YYYY-MM-DD)

Wells Fargo 1234 2020-02-29

1. If Financial Affidavits have already been completed, provide copies
2. Fully Completed Client Data Sheets with Post-Divorce Budget estimates for each party
3. 3 years of tax returns with **all supporting schedules and W-2s**
4. Last 3 month's statements on all investment accounts
5. Last 3 month's statements for all bank accounts, checking and/or savings
6. Most recent three statements from any employee retirement plan, pension, or deferred comp plan
7. Most recent statement on any Employee Stock Option, Employee Stock Purchase Plan, or Restricted Stock accounts.
8. Most recent mortgage statement
9. Most recent pay stubs for each party
10. Last 3 month's statements for any and all credit cards with balances.
11. Copies of most recent statements for any outstanding loans.
12. Policy statements or information on any and all Life Insurance, Annuities, or Cash Value Insurance
13. Social Security Estimate statements for both parties. These are available at www.SSA.gov
14. For any businesses owned, a full Profit and Loss Statement and Balance Sheet for current and previous 2 years
15. For all autos owned - VIN numbers and current mileage on vehicle.
16. Credit reports for both parties from www.AnnualCreditReport.com, www.CreditKarma.com, or other.