




DIVORCE WORKSHEET

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Checklist: Getting Organized

If divorce is in your near future, you will need to make sure you have a way to stay organized.

You will save time, money, and lower your stress levels if you can put your hands on a document the moment your lawyer, mediator, or financial planner asks for it. A portable accordion folder is a good way to keep everything in one place if you prefer to work with hardcopies vs keeping an electronic file.

There will be a lot of information. Here are some common tabs and/or file names to start with:

1. Documents FROM my Lawyer
2. Documents FOR my Lawyer
3. Documents FROM my Financial Planner (or CPA)
4. Documents FOR my Financial Planner or (CPA)

Documents would include items such as:

- Financial or investment statements (most recent available)
- Financial Affidavits for both parties (if available)
- 3 years of income tax returns for both parties (if possible)
- Employee benefit/retirement information (hardcopy format or know the login and password to your HR/Benefits site)
- Information regarding your mortgage(s)
- Most recent paycheck stubs for both parties (if possible)
- List of assets/debts
- Marital Property inventory and/or receipts
- Non-Marital Property inventory and/or receipts
- Household inventory (use the "Household Inventory Worksheet" to help with this)
- Household budget documentation, bills, and/or receipts
- Bank account statements (joint and separate)
- Credit card statements (joint and separate)
- Child or spousal support (paid or received)
- Insurance information (car, home, life)
- Any other documents that would have a bearing on your financial situation.