



Financial Documentation Overview – Getting Started

Below you will see a general overview of financial documentation to pull together as part of the divorce preparation process. This is not a fully exhaustive list, and as the divorce process continues, you will need to pull together more details and supporting documentation regarding assets, income, debt and expenses. However, having a consolidated overview pulled together as you interview divorce professionals (attorneys, mediators, coaches, financial planners, etc) will help you get started in the right direction.

General Financial Overview

- ☐ Pull tax returns for last three years

- ☐ Confirm current annual earnings (base salary + bonus/commission) for Spouse 1.
How long has Spouse 1 been at this earning level?

- ☐ Confirm current annual earnings (base salary + bonus/commission) for Spouse 2.
How long has Spouse 2 been at this earning level?

- ☐ Confirm general details in regards to overall total of assets. Approximately how much combined monies are in savings or investment accounts or retirement accounts? Don't forget about any cash kept on hand or substantial artwork, jewelry or other possessions of value.

- ☐ Confirm general details in regards to marital and individual debts including credit card debt, medical bills, mortgage and/or other private loans.

- ☐ Confirm general details regarding expenses such as rent or mortgage payments, utilities, insurance, child care and child related expenses, etc.