



Divorce Financial Information Checklist

One way to bring at least a small measure of order to the often chaotic process of divorce is to properly prepare yourself for the financial transition. A divorce attorney and Certified Divorce Financial Analysts can help guide you through this confusing time, but you will do yourself a big favor by gathering the necessary information and staying organized. Keeping a folder of the vital information listed below—whether electronically or in paper form—should make navigating all the required paperwork and decision-making less stressful.

Documents to make sure you have copies of:

- Tax returns from the past five years
- List of items in safe deposit boxes or storage
- Proof of both spouses' income, such as W-2 or 1099 forms
- Statements from checking and savings account
- Statements from investment accounts
- Real estate and mortgage records
- Home equity loan statements
- Most recent property tax bill
- Promissory notes
- All insurance policies
- Complete records for any businesses owned
- Titles to any vehicles
- Three most recent credit card statements
- Statements for retirement accounts
- Health insurance policies
- List of personal property owned
- Most recent property tax bill
- A current household budget
- Account statements for student loans
- Account statements for personal loans
- Most recent paystubs for both spouses
- Medical savings account information
- Statement on the mileage and condition for all vehicles

Send name/address changes to:

- Financial institution(s)
- Lenders
- Home, life, health, auto insurance provider(s)
- Accountant/tax professional
- Credit card companies
- Investment account provider
- DMV
- IRS
- Unemployment office
- State tax board
- Social Security Administration

- Pension/retirement plans
- Student loan providers
- Mortgage company
- Online business accounts
- Credit bureaus
- Titles or deeds that will be in your name
- Veterans affairs

Other items to consider:

- Change passwords for any accounts you will be taking over
- Reexamine your needs for all insurance policies
- Change beneficiaries for retirement, investment and insurance accounts
- Bring your will current