



239 Baltimore Pike • Glen Mills, Pennsylvania 19342  
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## Divorce Document Checklist

In order to complete/begin the casework on your file, please provide the following information as soon as possible.

### COURT CASE/HEARING INFORMATION

- Draft of Divorce Decree
- Mediation Summary
- Information on Next Mediation Date
- Friend of the Court Child Support Recommendation
- Information on Next Court Date
- Interrogatories/Depositions/Requests for Info
- QDRO (Qualified Domestic Relations Order)

### FINANCIAL DATA

- Tax Returns For Client, Spouse, and Joint (Last 3 Years)
  - Personal Tax Returns
  - W-2s and 1099s (Last 3 Years)
  - Partnership/Corporate Tax Returns
  - Any Amended Tax Returns
- Partnership/Corporate Financial Statements for Client and Spouse
- Payroll Stubs for Client and Spouse (3 Most Recent)
- Monthly Expenses for Client and Spouse
- Social Security Statements for Client and Spouse
- Life Insurance Policies and Most Current Statement for Client and Spouse (Personal and Through Work)
- Pension Plans (Defined Benefit and Defined Contribution) for Client's Plans:
  - Summary Plan Description
  - Benefits Booklet
  - Most Recent Statements (3 years)
  - Benefits Estimate:
    - At Earliest Retirement Age
    - At Normal Retirement Age
    - At Current Age (If Eligible)
    - Early Retirement Option Elections
- Pension Plans (Defined Benefit & Defined Contribution) for Spouse's Plans:
  - Summary Plan Description
  - Benefits Booklet
  - Most Recent Statements (3 Years)
  - Benefits Estimate:
    - At Earliest Retirement Age
    - At Normal Retirement Age
    - At Current Age (If Eligible)
    - Early Retirement Option Elections



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## FINANCIAL DATA CONTINUED

- Stock Options for Client and Spouse
  - Benefits Booklets
  - Most Recent Statements (3 years)
- IRA, Roth IRA, Keogh, SEP, 401(k), 403(b), 457 & Non-Qualified Deferred Compensation Statements for Client and Spouse
- Primary Residence and Other Real Estate
  - Appraisal
  - Date of Purchase
  - Purchase Price
  - Original Mortgage Amount
- Cancelled Checks and Bank Statements for Client's and Spouse's Joint, Business, Partnership and Corporate Accounts for previous six months
- Savings/Passbook Account Statements for Client's and Spouse's Joint, Business, Partnership and Corporate Accounts for previous three years
- Statements regarding Securities, Money Markets, Brokerage, CDs, Commodities, Mutual Funds, Investment Accounts, Annuities, Stocks and Bonds for Client's and Spouse's Joint, Business, Partnership, and Corporate Accounts
- All Employee Benefit and Executive Compensation Booklets and Statements for Client and Spouse
- Wills, Trusts and Amendments or Codicils for Client, Spouse and Children
- Business or Partnership Agreements for Client or Spouse
  - Current Mortgage Amount as of \_\_\_\_\_
  - Interest Rate/Length of Mortgage
  - Monthly Payment
  - Second Mortgage Information
- Children's Bank, Savings, Insurance and Investment Account Statements for Previous three years
- Mortgage, Loan, and Credit Card Statements for Client's, Spouse's, Joint, Business, Partnership and Corporate Accounts
- Listing of all individual, joint and business non-investment assets (cars, boats, furniture, jewelry, collections, etc.)
- Information on Any Cash or In-Kind Transactions
- Other: \_\_\_\_\_  
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