

*If you have any questions, please call me at 619.795.1797*

*Thank you.*

*Please provide:*

1. Last 3 year's tax returns, personal and business
2. Copies of last 12 months pay stubs
3. List of all real estate with estimate of Fair Market Value and Tax Basis
4. Copy of all mortgage statements
5. Copy of all recent bank and/or credit union statements
6. Copy of all most recent investment statements
7. Copy of all most recent retirement account statements, i.e. IRA, TSA, 401k, 403b
8. List of companies where you have worked
9. List of defined benefit pension plans (company paid retirement plans)  
With Statement of Estimated Monthly Benefit at Retirement
10. Copy of recent Social Security benefit statement
11. Copy of all annuity statements
12. Copy of all life insurance statements or bring the policies
13. Copy of all Qualified and Non-Qualified company benefits, such as  
Stock Options, SERP, ESOP, ESPP
14. Health insurance information (Premiums, co-pays, etc.)
15. List of all debts and to whom the money is owed
16. List of all personal property (vehicles, jewelry, etc.) and estimated Fair Market Value
17. Copies of any Court forms that you have filled out for yourself or your attorney:  
Schedule of Assets & Debts Declaration  
Income & Expense Declaration
18. Copy of any agreements or Marital Settlement Agreement (MSA)
19. Copy of Trust(s), Living Will, and/or Will
20. Living Expenses – Please use form provided

Other information maybe requested as needed.

Thank you.

*Divorce Financial Solutions  
Cinda Jones, CFP, CDFIA  
Cinda@DivorceFinancialSolutions.com*