

## **Financial Records Checklist**

- Income tax returns for at least the last three years
- Proof of both spouses' income (paystubs, w-2 forms, and 1099 forms)
- Statements of any financial accounts, including checking and savings accounts, certificates of deposit, mutual funds and money market accounts
- All real estate records, including the marital home and unimproved land, (particularly related paperwork such as the deed, the promissory note, mortgage, statement from the lender showing the balance due, any appraisals of property, and the most recent tax bill)
- Personal property, such as automobiles, furnishings, collections (art, stamp, coin)
- Stocks, bonds, annuities, retirement plans, particularly pensions and profit sharing plans
- Medical savings accounts
- Whole life insurance policies
- Trusts

**And on the debt side, this includes, but is necessarily limited to:**

- Records of credit cards
- Vehicle loans, including the title(s), promissory note if the vehicle is encumbered, payment coupon or invoice from most recent payment
- Mortgages and home equity loans
- Promissory notes
- Student loans
- Other loans