ALTERNATIVE DIVORCE SOLUTIONS

DOCUMENT LIST

As we begin to work together, the assistance I can provide is directly dependent on you. I can only provide a thorough analysis if I have all the necessary information. Below is a list of documents that you and your spouse will need to provide as soon as possible. You don't need to send everything at once. If it is easier to do a little at a time, that is fine.

If scanned, documents should uploaded through Dropbox. You will receive an invitation to join the shared Dropbox folder after we receive a signed agreement from you.

- If Financial Affidavits have already been completed, provide copies.
- Fully-completed "Confidential Cash Flow Statement" (pages 3-16).
- 3 years of tax returns with all supporting schedules and W-2s.
- Most recent pay stubs for each party.
- Last 3 statements from all financial accounts (bank accounts, investment accounts, mutual funds, etc.).
- Last 3 statements from any employee retirement plans, pensions, deferred compensation plans, IRA's, and annuities.
    - You will also need to request the Summary Plan Document (or sometimes called the Summary Plan Description) for any employee retirement plan or pension. This may be available online or you will need to request it from HR.
- Last 3 statements from any and all credit cards.
- Policy statements or information on any and all Life Insurance, Disability Insurance, and Long-Term Care Insurance.
- Insurance policies for all autos owned as well as VIN and mileage. (See Assets page of Confidential Cash Flow Statement for documentation.)

- All information relating to loans and mortgages (most recent statement including your payment, current balance, interest rate, etc.).

- Most recent statement on any Employee Stock Option, Employee Stock Purchase Plan, or Restricted Stock accounts.

- Social Security Estimate statements for both parties. These are available at www.SSA.gov.

    - Click My Social Security to sign in or create a profile (Located on the left, bottom corner when you get to the site).
    - Click "Sign In or Create an Account".
    - Once logged in, print/save your full statement.

- Copy of a recent credit report. They are available for free at www.annualcreditreport.com.

- For any businesses owned, a full Profit & Loss Statement, and Balance Sheet for current year + previous 2 years.