



FINANCIAL DOCUMENTS SIMPLE CHECKLIST

NAME: _____

INCOME	Paystubs: last 3 months	NOTES N/A Spouse will provide I have questions
	Tax returns: last 3 years	
	W2 or 1099 forms: last 3 yrs	
	Buiz Income Stmts (if self employed)	
	Unemployment / Disability Records	
	Social Security & Retirement income Statements	

ASSETS Real Property	Mortgage Statements	NOTES N/A Spouse will provide I have questions
	Deeds	
	Appraisals	
Financial accounts & vehicles	Bank Statements: last 3 months	NOTES N/A Spouse will provide I have questions
	Investment Acct. Statements	
	Retirement Acct. Statements (incl. life ins. w/ cash value)	
	Vehicle titles (cars, boats, etc.)	

DEBTS	Credit card stmts: 3-6 months	NOTES N/A Spouse will provide I have questions
	Loan stmts: personal, auto, student	
	Mortgage stmts & HELOCS	
	Medical bills / other outstanding debts	

MARITAL PROPERTY	List of household furniture & appliances	NOTES N/A Spouse will provide I have questions
	Jewelry, artwork, or collectibles	
	Business ownership documents	
	Other:	



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<p>MONTHLY EXPENSES</p> <p>Please complete the expanded budget provided in the Welcome Email</p>	Utility bills: electricity, water, gas)	<p>NOTES</p> <p>N/A</p> <p>Spouse will provide</p> <p>I have questions</p>
	Rent or Mortgage	
	Insurance: health, auto, life	
	Childcare or education expenses	
	Transportation costs (gas, tolls, public transport	
	Other:	
	Other:	
	Other:	

<p>LEGAL AGREEMENTS</p>	Prenuptial agreement	<p>NOTES</p> <p>N/A</p> <p>Spouse will provide</p> <p>I have questions</p>
	Postnuptial agreement	
	Separation agreement	
	Previous court orders related to the marriage	

<p>OTHER MISCELLANEOUS</p>		<p>NOTES</p>

PRO TIPS

- **ORGANIZE YOUR DOCUMENTS:** USE FOLDERS OR LABELS TO SEPARATE CATEGORIES.
- **KEEP IT UPDATED:** MAKE SURE ALL DOCUMENTS REFLECT THE LATEST AVAILABLE INFORMATION.
- **SECURE YOUR DATA:** USE THE ADR PORTAL OR ENCRYPTED METHODS TO UPLOAD SENSITIVE INFORMATION.