



# THE MEDIATION CENTER

## **DIVORCE/SEPARATION INFORMATION CHECKLIST**

The following documents and other information will help you, your spouse and your mediator with the mediation process. Getting these documents together will help you navigate your divorce/separation most effectively.

- \_\_\_\_\_ Current Contact information.
- \_\_\_\_\_ Personal information for you and your spouse (names, dates of birth, date of marriage, date of separation, names and ages of children from this marriage and from other relationships).
- \_\_\_\_\_ Individual income tax returns for past three years (federal and state).
- \_\_\_\_\_ Business income tax returns for past three years (federal and state).
- \_\_\_\_\_ Information regarding your current income (W-2 forms, 1099 forms, K-1s, recent paystubs). Include any government benefits or disability benefit.
- \_\_\_\_\_ Information regarding your spouse's current income (W-2 forms, 1099 forms, K-1s, recent paystubs). Include any government benefits or disability benefits.
- \_\_\_\_\_ Prenuptial or post-marital agreements, if any.
- \_\_\_\_\_ List of any income sources not detailed above and pertinent details (personal loans you hold, debts others may owe you, etc.).
- \_\_\_\_\_ Include any sources of future income you are expecting (pensions, etc.).
- \_\_\_\_\_ List of assets you own, including most recent statements for anything on the list (e.g., bank account statements, brokerage statements, etc.) Include any illiquid assets such as coin, baseball cards, jewelry, antiques, etc.
- \_\_\_\_\_ Include the basis for your home as well as any non-retirement assets
- \_\_\_\_\_ If the accounts were open before the marriage, include the balances at the time of the marriage.
- \_\_\_\_\_ Separate property (pre-marital), inheritances, personal injury awards. List of separate assets claimed for each spouse.



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## **DIVORCE INFORMATION CHECKLIST (con't)**

- \_\_\_\_\_ List of assets in your children's name(s), including most recent statements for anything on the list (e.g., bank account statements, brokerage statement, etc.)
  
- \_\_\_\_\_ List of debts you owe, including most recent statements for anything on the list (e.g., mortgage statements, credit card statements, auto loans, personal loans, etc.) Include any debts that are in collection and details of any past bankruptcies (if applicable).
  
- \_\_\_\_\_ List of debts you co-signed for, including most recent statement for anything on the list (e.g., student loans, auto loans, or mortgage statements, etc.)
  
- \_\_\_\_\_ Documentation regarding retirement plans for you and your spouse (401(k) statements, pension plan documents, IRA statements, etc.).
  
- \_\_\_\_\_ Documentation regarding stock options and restricted stock, including vesting schedules.
  
- \_\_\_\_\_ Health insurance information, including current policy coverage and costs.
  
- \_\_\_\_\_ Life insurance held by either party. Include copies of policies and statements.
  
- \_\_\_\_\_ Real property valuation documents (appraisal, market analysis, etc.) List of contents of safe deposit boxes or safes (including locations).
  
- \_\_\_\_\_ List of all vehicles, including campers, trailers, ATV's, motorcycles, etc. you own and valuation information from Kelley Blue Book ([www.kbb.com](http://www.kbb.com))
  
- \_\_\_\_\_ Business financial statements (profit and loss statements, balance sheets) for past three (3) years, if applicable
  
- \_\_\_\_\_ Loans taken out within the past three years.
  
- \_\_\_\_\_ Details of any degrees and/or licenses held by each spouse. Details of future Social Security benefits for each spouse.