



Divorce Preparation Checklist

Gathering the right documents early gives your attorney the full picture from day one and puts you in the strongest possible position. Use this checklist to organize your records before your consultation. Not every item will apply — check off what you have and note anything you still need to locate.

1. Financial Documents

- Tax returns as filed in the past three (3) years — all pages and schedules
- W-2 statements as filed in the past three (3) years
- 1099 statements as filed in the past three (3) years
- Business tax returns for the past three (3) years
Required if you are self-employed or an owner of a closely-held business
- Most recent 6 months of pay stubs — both spouses
- Most recent 6 months of bank statements: checking, savings, and money market accounts
- Credit card statements as received in the past three (3) years — all accounts
- Mortgage statements as received in the past three (3) years
- Retirement and pension account statements: 401(k), IRA, 403(b), pension plan, deferred comp
- Investment and brokerage account statements
- Car loan statements and/or monthly payment amount and remaining lease term
- Personal loan statements and/or monthly payment amount and loan term
- Tax delinquency documents as received in the past three (3) years
- Life insurance policies showing any cash surrender value
- Records of inheritances or gifts received during the marriage
- Documentation of separate (pre-marital) property or funds
- Social Security earnings statement — available online at ssa.gov



2. Property & Assets

- Deed(s) for all real property: marital home, rental properties, vacation property
- Most recent mortgage statement(s) for all properties
Include any home equity line of credit (HELOC) statements
- Most recent real property tax assessment
- Vehicle titles and current registration documents
- Titles for boats, RVs, motorcycles, or other recreational vehicles
- Business ownership documents
Operating agreements, articles of incorporation, shareholder agreements, buy-sell agreements
- Any professional appraisals or valuations of real estate or business interests
- Stock options, RSUs, restricted stock, or deferred compensation plan documents
- Cryptocurrency account records and current wallet balances
- Records of valuable personal property: jewelry, artwork, collectibles, firearms
- Safe deposit box inventory

3. Children & Custody

- Children's full legal names and dates of birth
- Current school enrollment information and recent school records
- Names and contact information for all pediatric and medical providers
- Health insurance cards and policy documents covering the children
- Records of any special needs, therapies, or educational accommodations
Include IEP, 504 plan, or related service records if applicable
- Documentation of the current parenting schedule or living arrangement
- Records of extracurricular activities and associated monthly costs
- Childcare provider name, contact information, and monthly cost
- Any prior family court orders or custody agreements
Include orders entered in any other state if applicable
- Documentation of each parent's work schedule and general availability



4. Legal & Personal Documents

- Completed Statement of Net Worth (Financial Affidavit — DRL § 236B)
- Original or certified copy of your marriage certificate
- Prenuptial or postnuptial agreement
If one was signed at any point during the marriage
- Both spouses' birth certificates
- Both spouses' Social Security cards
- Both spouses' current passports
- Birth certificates and passports for all children
- Health insurance documents
Name of insurance provider; who currently carries coverage for all family members; employer coverage options including rates for single vs. family plans
- Wills, trusts, and all other estate planning documents
- Powers of attorney and healthcare proxy designations
- Homeowner's or renter's insurance policy
- Automobile insurance policies
- Any prior separation agreements or qualified domestic relations orders (QDROs)
- Prior court orders or judgments involving either spouse
Including any bankruptcy filings, prior divorces, or criminal matters
- Documentation of any domestic incidents, police reports, or orders of protection

Ready to take the next step?

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