



Your Divorce Advocate

Creating Clarity out of Chaos

Divorce Document Checklist

I recommend gathering and making copies of the documents listed below as you prepare for divorce. You do not need to have all of these documents before you file for divorce, but these documents will ultimately be necessary to create a complete and thorough Marital Settlement Agreement (MSA) between you and your soon-to-be-ex-spouse.

You will typically need to collect 6-12 months of statements prior to completing your MSA so doing as much of this gathering in advance is helpful. For purposes of getting started, try to collect as least one of each of the following statements or documents.

(Tip: If you do not have immediate access to a copier, take photos.)

Personal Information (originals or copies)

- Birth certificates for self and children
- Social Security cards for self and children
- Passports for self and minor children
- Medical insurance cards for self and minor children
- Marriage certificate
- Medical information for minor children (doctor's names and contact info)
- Names of schools the children attend
- Tuition statements if in private school or college

Business Documents

- Tax returns (at least most recent 2 years)
- Business bank accounts
- Business credit card accounts
- Profit and loss statements
- Incorporation documents/filings
- Documents related to any lines of credit

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Personal Financial Documents

- Tax returns (at least most recent 2 years)
- Bank statements
- Investment account statements
- 401K statements (for both spouses)
- IRA statements
- Pension statements
- Annuity statements
- Credit card statements
- Minor children's bank statements
- Family or personal trusts documents
- Student loan statements
- Financial aid documents (if there are college students)
- Documents related to any lines of credit
- Recent pay stubs
- Auto loan statements
- Vehicle registration
- Documents or appraisals of valuable antique's/jewelry/art
- Airline frequent flyer numbers
- Hotel and other loyalty point accounts
- Pull copies of your credit report

Real Estate

- Mortgage statements for all properties owned
- HOA statements
- Deed of Trust to any real estate owned, including rental properties
- Timeshare property statements, membership terms
- Utilities: gas/electric, water, cable/internet, phone (cell and landlines), etc.
- Membership statements and terms: country clubs, golf clubs, gyms, etc.

Insurance Statements

- Homeowners
- Auto
- Health
- Life Insurance
- Any other insurance policy's

Ongoing Miscellaneous Costs

- Pets - medical and maintenance
- Landscaping
- Pest control
- Housekeeper

Although this is a fairly extensive list of documents to gather, it may not represent EVERY document you will need for your divorce.