

FORM 1 DOCUMENT GATHERING CHECKLIST

Check the box when you have a copy. Note where the copy is stored.

Get copies of what you have a lawful right to see. Do not guess a password to obtain any of it.

Income

Federal tax returns, last 3 years *all schedules, W-2s, 1099s*

State tax returns, last 3 years

Your pay stubs, last 3 months

Spouse's pay stubs, last 3 months

Bonus, commission, or RSU statements

Business tax returns and K-1s

Social Security, pension, or disability statements

Accounts and Investments

Checking account statements, last 12 months

Savings account statements, last 12 months

Credit card statements, last 12 months *read these line by line*

Brokerage and investment statements

401(k), 403(b), IRA, and pension statements

Stock option or equity grant documents

Crypto or digital asset records

Property and Debt

Deed to any real estate

Mortgage statements and payoff amounts

Most recent property tax assessments

Vehicle titles and loan statements

Appraisals for home, business, jewelry, art

Loan documents and promissory notes

Your credit report, all three bureaus

Insurance and Personal

- Health insurance card and plan summary _____
- Life insurance policies and beneficiary designations _____
- Auto and homeowner's policies _____
- Marriage certificate _____
- Prenuptial or postnuptial agreement _____
- Prior court orders involving you or the children _____
- Children's birth certificates and Social Security cards _____
- Documents tracing any inheritance or premarital property _____

Where are your copies stored?

Somewhere outside the marital home is the right answer.

Location: _____