

DOCUMENT CHECKLIST

Please complete this checklist to ensure you provide us with all the documentation necessary for us to prepare accurate financial reports. **Return this form** with your budget reports, and the **most recent** copies/statements of all required documents to us three **(3) business days prior** to your mediation session. Documents can be emailed, mailed or dropped off at our office.

****PHOTOS/SCREENSHOTS TAKEN WITH PHONES WILL NOT BE ACCEPTED.****

****PLEASE SUBMIT ALL DOCUMENTATION AT THE SAME TIME.****

- ☐ Three sequential most recent pay-stubs
- ☐ W-2 or Form 1099
- ☐ Three sequential years documentation of bonus income
- ☐ Death benefit of **all** life insurance policies
- ☐ Cash surrender value of **all** life insurance policies
whole life and universal life policies
- ☐ Beneficiaries of all life insurance policies
- ☐ Current first mortgage statement
- ☐ Current second mortgage statement
- ☐ Current equity line (HELOC) statement
- ☐ Comparative Market Analysis (CMA) /home appraisal
obtained within last three months
- ☐ Value of home on date of marriage
if purchased prior to the marriage
- ☐ Most recent auto loan or lease statement
- ☐ Current student loan statement
- ☐ Current retirement account loan balance & payment
- ☐ Auto/municipal/fire tax statements
- ☐ Current credit card statements - **summary page only**
- ☐ Real Estate tax bill
- ☐ Homeowner's insurance statement
- ☐ Monthly landlord expenses for rental property
- ☐ Most recent **summary page** of all bank account statements
including children's accounts
- ☐ Most recent retirement account statements
(IRA, Roth IRA, 401k, 403b, 401a, TIAA, etc.)
- ☐ Pre-marital value of retirement accounts if applicable
(as of date of marriage)
- ☐ Pension statements
(obtained from pension administrator)
- ☐ Certificate of Deposit (CD) statement
- ☐ Current annuity statement
- ☐ Deferred Compensation statement
- ☐ Stocks/stock option valuation

If you are self-employed/business owner

- ☐ Most recent tax return
- ☐ Year-to-date P&L statement
- ☐ Balance sheet or statement of business net worth
- ☐ Schedule C