

Divorce Prep Checklist



Gather as many of these documents as possible before meeting with an attorney. Don't worry if you can't find a document or don't have access; an attorney can request copies during the discovery process of your divorce.

- Gather financial documents
 - Federal & state tax returns for last 5 years
 - Bank statements
 - Investment account statements
 - Retirement account statements
 - Mortgage, loan & credit card statements
 - Pension plan documents
 - Property appraisals & tax statements
 - Bills
 - Proof of income & expenses
 - Monthly budget spreadsheet
 - Credit report

Divorce Prep Checklist



- Gather estate documents
 - Health insurance policies
 - Life insurance policies
 - Wills
 - Living trusts
 - Powers of attorney
 - Advance healthcare directives
- Gather other important documents
 - Marriage license
 - Birth certificate(s)
 - Social security card(s)
- Establish independence
 - Get a P.O. box and redirect personal mail
 - Create new email account

Divorce Prep Checklist



- Change passwords on all personal online accounts
- Open bank account(s) in sole name
- Open credit line in sole name
- Other
 - List marital problems that led to divorce
 - Create list of debts and assets
 - Gather medical records for last 5 years
 - If kids are involved, list parenting issues that need addressing
 - List contact info of witnesses who would testify on your behalf at trial if needed
 - Gather photographs, audio recordings, and/or video recordings that may be useful at trial if needed