

Checklist: Getting Organized

If you are embarking on the divorce process, it's important to gather important documents up-front and create an organizational system that will allow you to access information quickly and easily. This will save time, money and lower your stress levels.

An accordion folder is a good way to keep everything in one place – it's portable so you can easily take your files to meetings. It's a good idea to label tabs so they are specific to your situation. For example:

- ✓ Documents for my Lawyer/Mediator
- ✓ Documents from my Lawyer/Mediator
- ✓ Documents for my CDFA
- ✓ Documents from my CDFA

Here is a list of documents you will need to get your started:

- ✓ Marriage certificate and prenuptial agreement
- ✓ Estate plan documents
- ✓ Bank, brokerage and retirement account statements
- ✓ Credit card statements (joint, separate)
- ✓ Business financial statements
- ✓ Monthly bank statements
- ✓ Life, health and disability insurance policies
- ✓ Auto, homeowners and renters insurance policies
- ✓ Tax returns for the past five years (if possible)
- ✓ Mortgage or home equity loan documents
- ✓ Outstanding bills or obligations
- ✓ Real property deeds
- ✓ Motor vehicle titles
- ✓ Birth certificates, Social Insurance Numbers and passports of spouse and children
- ✓ List of Assets
- ✓ List of Debts
- ✓ Household bills and / or receipts

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