Divorce document checklist

Having all of your important documents in one place will help you as you prepare for negotiations. Use this checklist to help gather and save the documents you'll need as you work through your divorce. Some might not apply to your situation, so use this as a guide.

And remember, we're here to help. Call Fidelity at **800-343-3548** to speak with a financial professional about our 1:1 guidance. Our team can help you rebuild or refocus with a sound investment strategy.

Taxes

Returns

From the last 3 years:

- ☐ Federal tax return
- ☐ State tax return
- ☐ W-2

From last year:

- ☐ 1099
- ☐ Schedule K-1

Statements

- ☐ Social Security
- ☐ Property tax
- ☐ Excise tax

Debts & loans

Mortgage

- ☐ Primary mortgage documents
- ☐ Secondary mortgage documents
- ☐ Mortgage applications

Credit cards

From the last 3 years:

- ☐ Bank statements

Loans

- ☐ Car loans
- ☐ Student loans
- ☐ Personal loans
- ☐ Boat loans
- ☐ Loan applications

Family details

Self

- ☐ Legal name, phone(s), email(s), address(es), date of birth, SSN
- ☐ Employer (name, address, phone)
- ☐ Health insurance
- ☐ Certified copy of marriage certificate

Spouse

- ☐ Legal name, phone(s), email(s), address(es), date of birth, SSN
- ☐ Employer (name, address, phone)
- ☐ Health insurance

Child/dependents

- ☐ Legal name, phone(s), email(s), address(es), date of birth, SSN
- ☐ Employer (name, address, phone)
- ☐ Health insurance

What you earn

Primary income

- ☐ Pay information (base pay, overtime, tips, commission, bonuses, etc.)
- ☐ Last 4 pay stubs

Secondary income

- ☐ Investment income (dividends, interest, trusts, annuities, pension, retirement funds)
- ☐ Additional income (Social Security income, disability, unemployment insurance, workers compensation)
- ☐ Other income (child support, alimony, rental income, royalties/other wages, income from household members)
- ☐ Deferred compensation/bonus information
- ☐ Other pay stubs and checks/receipts

What you spend

Household

- ☐ Rent/mortgage payment
- ☐ Homeowners insurance
- ☐ Home maintenance costs
- ☐ Homeowners association fees
- ☐ Real estate taxes
- ☐ Groceries & food
- ☐ In-home care documents
- ☐ Other (laundry, cleaning, personal care, clothing, entertainment, memberships, etc.)

Utilities

- ☐ Gas, electricity, and oil
- ☐ Trash/recycling
- ☐ Water and sewer
- ☐ Phone, cable, and internet
- ☐ Security services

Dependents

- ☐ Childcare (child support, daycare, etc.)
- ☐ Education expenses (college savings, tuition bills, etc.)
- ☐ Extracurricular expenses (sports, activities, etc.)
- ☐ Pet care (food, vet, daycare, etc.)
- ☐ Child support court order

Other

- ☐ Professional services fees
- ☐ Personal education (tuition, access fees)
- ☐ Work-related expenses (uniform, travel, licensing, etc.)
- ☐ Insurance (medical, dental, vision, life, disability, transportation, etc.)
- ☐ Medical (uninsured expenses, prescriptions, therapy, etc.)
- ☐ Transportation (fuel, maintenance, public transportation, tolls)
- ☐ Charitable contributions

What you own

Real estate

- ☐ Information (type, address, title holder, purchase price, date purchased, etc.)
- ☐ Value (current assessed value, date of last assessment, fair market value, etc.)
- ☐ Details (mortgage outstanding amount, equity, title, deed, real estate assessment, etc.)
- ☐ Evidence of purchase funds (gift or inheritance documents)

Motor vehicles

- ☐ Information (type, make, model)
- ☐ Value (purchase price, date of purchase, fair market value, equity)
- ☐ Details (title and registration)

Financial accounts

- ☐ Account statements (checking and saving)
- ☐ Additional assets (type, beneficiaries, assessment of value, receipts, insurance)
- ☐ Social Security documents
- ☐ Pension documents

Investment accounts

- ☐ IRA documents
- ☐ Annuities documents
- ☐ Workplace savings plan documents (401(k), 403(b), etc.)
- ☐ Stock options
- ☐ 529 plan documents
- ☐ Stock certificates, bonds, CDs, mutual funds, money market funds
- ☐ Trust paperwork