

Divorce Summary Sheet

Gathering all your information in one place can help you get organized for the divorce process. Use this document to write down important details. As you go through each item, you may also want to gather the corresponding documentation to back it up (tax returns, employment records, banking and credit card statements, etc.).

Part 1: People

You

Name

Email address

Your spouse

Name

Email address

Children and dependents

Child or dependent 1

Name

Date of birth

Child or dependent 2

Name

Date of birth

Child or dependent 3

Name

Date of birth

Have more than three children or dependents? There's space to list them on the next page.

Pets or other animals

Pet 1

Name

Who adopted the pet?

Pet 2

Name

Who adopted the pet?

Have more than two pets? There's space to list them on the next page.

Documents to gather

- Certified copy of marriage certificate Social Security cards Birth certificates
 Name-change paperwork, if applicable

Part 1: Additional space

Children and dependents

Child or dependent 4

Name

Date of birth

Child or dependent 5

Name

Date of birth

Child or dependent 6

Name

Date of birth

Pets or other animals

Pet 3

Name

Who adopted the pet?

Pet 4

Name

Who adopted the pet?

Notes

Part 2: Income

An accurate tally of income sources will help with decision-making. When listing income sources, include a combined total of base pay, overtime, tips, commissions, bonuses, etc.

You	Your spouse
Annual income, before taxes <input type="text"/>	Annual income, before taxes <input type="text"/>

Child support and alimony numbers here refer to any current income sources, not future arrangements you might expect.

You	Your spouse
Child support income <input type="text"/>	Child support income <input type="text"/>
Alimony income, before taxes <input type="text"/>	Alimony income, before taxes <input type="text"/>

Other income could include investment income (dividends, interest, trusts, annuities, pension, retirement funds), additional income (Social Security, disability, unemployment insurance, workers compensation), and other sources like rental income.

You	Your spouse
Other income, before taxes <input type="text"/>	Other income, before taxes <input type="text"/>

Joint

Other income, before taxes

Documents to gather

- | | | |
|---|--|--|
| <input type="checkbox"/> Federal tax returns for the past 3 years | <input type="checkbox"/> State tax returns for the past 3 years | <input type="checkbox"/> Last 4 pay stubs |
| <input type="checkbox"/> Most recent statement from any investment income | <input type="checkbox"/> W2 forms for the past 3 years | <input type="checkbox"/> Any special tax forms such as 1099s or Schedule K-1s for the past 3 years |
| <input type="checkbox"/> Most recent statement from any additional income sources | <input type="checkbox"/> Any legal documents regarding settlements, child support, alimony, etc. | |

Part 3: Expenses

For clarity, you may want to record the frequency of payments (monthly, quarterly, annually, etc.) as well as the amounts.

Home

If you rent or own more than one property, be sure to include the total expenses of all properties.

Monthly rent or mortgage

Annual insurance

Annual property taxes

Monthly fees (HOA, condo, etc.)

Documents to gather

Primary mortgage or lease documents

Tax statements

Secondary mortgage documents (for example, home equity loans)

Statements for related fees

Utilities

If you rent or own more than one property, be sure to note utility costs for each independently. There's extra space on pages 2 and 8 if you need it.

Electricity

Gas

Oil

Water and sewer

Trash and recycling

Cable and internet

Home security services

Other

Documents to gather

Recent bills and statements for utilities and services

Child care

If you have more than one child or dependent, include total costs for all of them.

In-home child care

Day care

Afterschool care

Summer camp

Tuition and school fees

Sports and activities

Other (clothing, meals)

Documents to gather

Recent applicable bills, statements, and receipts

Part 3: Expenses (continued)

Debts and loans

List all debts you and your spouse hold, including credit cards, student loans, personal loans, home equity loans, and others.

Debt 1 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 2 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 3 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 4 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 5 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 6 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 7 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 8 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 9 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Debt 10 type	Creditor or institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Part 4: Assets and insurance

Real estate

Property 1

Type (Residential, commercial, etc.)

Purchase price

Year of purchase

Mortgage balance

Estimated market value

Sites like [Zillow.com](https://www.zillow.com) or [Realtor.com](https://www.realtor.com) can help you estimate a property's value, but consult your attorney and realtor to get an exact appraisal before finalizing your divorce.

Property 2

Type (Residential, commercial, etc.)

Purchase price

Year of purchase

Mortgage balance

Estimated market value

Have more than two properties? There's space to list them on page 9.

Vehicles

Vehicle 1

Owner name

Year

Make

Model

Loan balance or lease remainder

Estimated value

Sites like [KBB.com](https://www.kbb.com), [Edmunds.com](https://www.edmunds.com), or [Autotrader.com](https://www.autotrader.com) can help you estimate a value for a vehicle.

Vehicle 2

Owner name

Year

Make

Model

Loan balance or lease remainder

Fair market value

Vehicle 3

Owner name

Year

Make

Model

Loan balance or lease remainder

Fair market value

Have more than three vehicles? There's space to list them on page 9.

Part 4: Assets and insurance (continued)

Financial accounts

List all types of accounts you and your spouse own, including checking, savings, money market, CDs, retirement (401(k), IRA, etc.), 529s, HSAs, investments, annuities, trusts, and others. Use the Ownership box to list account owner names and whether it's an individual or joint account.

Account 1 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 2 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 3 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 4 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 5 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 6 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 7 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 8 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 9 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account 10 type	Financial institution	Estimated balance	Ownership
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Documents to gather

- Account statements
- Account paperwork (beneficiaries, cash value, etc.)
- Pension and retirement documents
- Social security documents

Part 4: Assets and insurance (continued)

Insurance

Use the Coverage details box to list things like coverage amounts, who a policy covers, policy types, etc.

Health

Policy holder

Carrier

Coverage details

Dental

Policy holder

Carrier

Coverage details

Vision

Policy holder

Carrier

Coverage details

Life

Policy holder

Carrier

Coverage details

Notes

Part 4: Additional space

Real estate

Property 3

Type (Residential, commercial, etc.)

Purchase price

Year of purchase

Mortgage balance

Estimated market value

Sites like [Zillow.com](https://www.zillow.com) or [Realtor.com](https://www.realtor.com) can help you estimate a property's value, but consult your attorney and realtor to get an exact appraisal before finalizing your divorce.

Property 4

Type (Residential, commercial, etc.)

Purchase price

Year of purchase

Mortgage balance

Estimated market value

Vehicles

Vehicle 4

Owner name

Year

Make

Model

Loan balance or lease remainder

Estimated value

Sites like [KBB.com](https://www.kbb.com), [Edmunds.com](https://www.edmunds.com), or [Autotrader.com](https://www.autotrader.com) can help you estimate a value for a vehicle.



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