



Well Lived Wealth Pre-Divorce Checklist: Organizing Your Important Papers

Before initiating a divorce, setting up an effective organizational system is crucial. This will help you manage paperwork efficiently, save time, reduce costs, and alleviate stress. Consider using an accordion folder for easy portability and organization and a flash drive or file folder on your mobile device.

Label tabs according to your needs, such as:

- **Documents For My Lawyer**
- **Documents From My Lawyer**
- **Documents For My CDFA® Professional** (Certified Divorce Financial Analyst)
- **Documents From My CDFA® Professional**
- **To-Do Lists**

Essential Documents to Gather:

1. **Financial Statements:** Collect statements for both parties, if available.
2. **Income Tax Returns:** Obtain at least three years of returns for both parties, if possible.
3. **Investment Details:** Compile information on all investments.
4. **Employee Benefits/Retirement Information:** Gather details about retirement accounts and benefits.
5. **Mortgage Information:** Include details about all mortgages.
6. **Paystubs:** Secure the most recent paystubs for both parties, if possible.
7. **List of Assets:** Document all assets owned.
8. **List of Debts:** Record all outstanding debts.
9. **Marital Property Inventory:** Include any receipts or documentation.



10. **Non-Marital Property Inventory:** Provide receipts or documentation for non-marital assets.
11. **Household Inventory:** Use a worksheet to document household items.
12. **Household Bills/Receipts:** Collect recent bills and receipts.
13. **Bank Account Statements:** Include both joint and separate accounts.
14. **Credit Card Statements:** Gather statements for both joint and separate accounts.
15. **Child or Spousal Support:** Document any support paid or received.
16. **Insurance Information:** Compile all relevant insurance documents.
17. **Additional Documents:** Include any other documents that may impact your financial situation.

Task Management

- **Create To-Do Lists:** Start using to-do lists to keep track of tasks. Consider software for task management or a diary for daily reference.
- **Set Deadlines:** Ensure deadlines are set for each task to avoid delays, especially when providing documents to your lawyer.

By organizing these documents and tasks, you will be well-prepared to manage the complexities of divorce proceedings efficiently.

If you or someone you know is experiencing or considering divorce and would like a Divorce Consultation with one of Well Lived Wealth's Certified Divorce Financial Analysts, please reach out to schedule an appointment at team@WellLivedWealth.com or 713 402 6466.

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