

## **Documents and information needed for first consultation**

Please bring with you to our meeting as much of this documentation as possible. The more information you bring with you, the more accurate and comprehensive my advice will be. If not all of this information is available to you, you or we can collect it later.

### **ASSETS (Joint and Individual)**

For each asset presently owned by you and/or your spouse, please bring a copy of the most recent statement or appraisal showing the current value of that asset. If you are already separated, please also bring a copy of the statement or appraisal closest to your date of separation. If you do not have an appraisal, it is not necessary to get one before we meet.

#### **Assets Include:**

- Real estate - copy of deed, recent appraisals, and market analysis if available
- Cars, boats, airplanes, motorcycles --copy of title if available, and most recent property tax statement/bill, copy of Kelly Blue Book private party sale value for automobiles
- Bank accounts (checking, savings, money market, etc.) – statement closest to date of separation and current
- Investment accounts, mutual funds, stock trade accounts, etc. -- statement closest to date of separation and current
- Certificates of deposit, bonds, stocks – documentation showing ownership, number of shares owned, and value as of date of separation (DOS) and present
- Retirement accounts (401(k), 403(b), IRA, Roth IRA, pensions, etc.) -- statement closest to date of separation and current
- Valuables (jewelry, collections, art, rugs, silver, guns, etc.) – list items of particular value and bring recent appraisals, if available
- Life Insurance policies with Cash Value (not term policies) – statement showing current cash value and cash value as of separation
- Annuities – current statement and date of separation statement
- Business interests – documentation of ownership interest and recent valuation, if available

### **DEBTS/LIABILITIES (Joint and Individual)**

For each debt or liability owed by you and/or your spouse, bring a copy of the most recent statement showing the current balance or amount owed. If you are already separated, please also bring a copy of the statement showing the balance of the debt as close to your date of separation as possible.

#### **Debts include:**

- Mortgage loans, home equity loans
- Lines of credit

- Unsecured or personal loans
- Automobile loans
- Credit Card debts
- Student Loans
- Loans against retirement accounts

**Income Information (For you and, if available to you, for your spouse)**

- Documentation of your and your spouse's income from all sources (salary, wages, bonuses, commissions, stock options, deferred compensation, retirement income, unearned income, etc.) earned/received for the past 12 months
- Your and your spouse's tax returns for the past 3 years, including Forms W-2, 1099, 1098 and all other schedules and attachments

**Child-related Expenses (If you and your spouse have children living at home or in college)**

- Amount of the monthly premium for the health insurance policy that covers your child/children. Please bring the schedule of costs provided by your employer, including the cost of employee only, employee and spouse, and employee and family/ children.)
- Documentation showing daycare, afterschool, before school costs (if applicable)
- Documentation showing private school and/or college costs (if applicable)

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