CHECKLIST FOR DIVORCING CLIENTS

Since divorce involves many financial issues, it makes sense to have a Certified Divorce Financial Analyst® (CDFA®) as part of your team. By providing expertise relating to the financial details of your divorce, we can tailor our services to help you obtain a more in-depth understanding of your financial options.

BAIRD
Private Wealth Management

Documents

Tax returns (individual and joint)
- At least last year, but ideally the 3 previous years

Previous year's W-2s

Previous year's 1099s

Pay Stubs
- 3 most recent paystubs
- Prior year 12/31 paystub

Partnership/Corporate Returns

Social Security statements

List of assets
- Marital property inventory and/or receipts
- Non-marital property inventory and/or receipts
- Household inventory

List of debts
- Information regarding your mortgage(s)

Financial statements
- Please provide details regarding investments
- Bank account statements (joint and separate)
- Credit card statements (joint and separate)

Employee benefit/retirement information
- Statements
- Plan documents
- Pension information
- Stock option information
- Retirement plan contributions (both employee and employer)

Insurance information
- Health Insurance
- Life Insurance
- Other insurance

Any other documents that would have a bearing on your financial situation

Cash Flow and Budget

- **What is your monthly and annual budget? Both before the divorce and after.**
- **Do you have any upcoming purchases or potential purchases (new home, new car, etc)**
- **What are your current sources of income?**
- **What are your current expenses relating to children?**
- **Are you currently paying down any debt?**

Rachel K. Bunnell, CFP®, MPAS®, CDFA®
Senior Vice President, Family Wealth Advisor
907-677-8340
RBunnell@rwbaird.com

PlanningGroupNW.com