PlanningThruDivorce LLC

Divorce Planning Document Checklist

Tax Planning

Personal Tax Returns (3 years)
Business Tax Returns (3 years)

Cash Management

Bank Statements (3 year)
Savings Accounts
Checking Accounts
Certificate of Deposit
Money Market Accounts

Debt Statements (3 year)
Home Mortgage
Credit Cards
Installment Loans/Personal Loans
Student Loans
Vehicle Loans
Home Equity Loans
Outstanding Medical Bills

Retirement Planning/Investment Planning Statements (3 year)

Employer Pension
Deferred Compensation Plan
Qualified Accounts
Investment Brokerage Accounts
Social Security Statements

Insurance Planning/Risk Management

Life Insurance Policies
Disability Insurance Policies
Health Insurance Policies
Auto & Home Owner's Insurance Policies
Liability Insurance Policies

Financial Statements

Net Worth Statement
Cash Flow Statement
Balance Sheet

Estate Planning

Current Wills
Medical Directives
Trust Documents
Guardianship (if applicable)

CREDIT REPORT – Request a copy of your credit report.
HEALTH INSURANCE – Request benefit documents.

Please email documents to: info@stradamanagement.com

305 Camp Craft Road, Suite 500, Austin, TX 78746
Office: 866-526-7098
www.stradamanagment.com F: 512.233.2280