

Financial Divorce Checklist

1. Consult professionals
 - ✓ Divorce attorney
 - ✓ Financial planner
 - ✓ Accountant
2. Take inventory and make copies of all the documentation below:
 - ✓ Birth certificates, social security cards, marriage license, and passports
 - ✓ Prenuptial/postnuptial agreement
 - ✓ Bank, brokerage, stock options, and retirement account statements
 - ✓ Deeds, titles, and estate plan
 - ✓ All insurance policies
 - ✓ Tax returns from the past 5 years
 - ✓ Sources of income
 - ✓ Memberships/perks/rewards
 - ✓ Mortgage/loan documents
 - ✓ Medical benefits
 - ✓ Safety deposit box
 - ✓ Inheritance or assets owned prior to marriage
 - ✓ Business valuations, buy-sell agreements, and financial statements
3. Pull your credit report
4. Take pictures of all the valuables
 - ✓ Personal property, antiques, vehicles, jewelry, toys
5. Record your household budget and expenses
6. Create a list showing all assets and liabilities
7. Open a P.O. box
8. Create individual accounts with new passwords
 - ✓ Email
 - ✓ Credit card
 - ✓ Checking/Savings account