

DOCUMENTS TO BRING TO INTERVIEW

- Completed Fact Gathering Questionnaire for Divorce Cases

- The most recent pay-stub from your work.

- Personal Income Tax Return (for the last three years)

- Business Tax Return (for the last three years)

- Insurance Policies: Life / Health / Disability / Umbrella / Homeowner

- Brokerage Statements and Stock Certificates

- Savings, Checking and Money Market Statements (last month only)

- Employee Benefit Plan Descriptions (Pension, Profit Sharing, Group Insurance, etc.) and Beneficiary Designation Forms

- Business Buy-Sell Agreements and Employment Contracts

- Pre-Nuptial or Post-Nuptial Agreements and Divorce Decrees / Property Settlements

- Deed(s) to Real Estate

- Titles to Cars, Trucks, Boats and Planes

- Current Will

- Current Trust (created by you or by others for your benefit)

- Current Powers of Attorney (financial and health care)

- Any Additional Documents That You Think I Should Be Aware Of