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# *27 Essential Documents Checklist for Smart Divorcees*

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## *27 Essential Documents Checklist for Smart Divorcees*

- Prenuptial or postnuptial agreements
- Income tax returns (3-5 years personal and business)
- W-2s, K-1s, 1099s and e-file authorization
- Pay stubs; year-end pay statements for tax returns
- Bank statements (checking, savings, CDs...etc)
- Statements for each financial asset
- Inventory of safety deposit boxes and safes
- Itemization of savings bonds
- Credit cards statements
- Check registers

- Invoices/receipts for major purchases
- Loan document package
- Retirement plan statement
- Employment/Independent contractor agreements
- Stock option, restricted stock statements
- Deferred compensation documents
- Life insurance policies
- Brokerage investment statements
- REITs (Real Estate Investment Trusts)
- Annuity documents and statements
- Balance sheet/Net Worth statements
- Loan, credit and bank applications
- Real estate ownership documents and deeds
- Business entity documents, including sole proprietorships, partnerships, LLCs and LLPs
- Art collections, valuable coins , stamp collection documents
- Loans to family members and friends
- Wills, trusts, powers of attorney, estate planning papers



## *Thank You!*

I hope you found this checklist helpful to decide your next step for your financially responsible divorce.

I'd love to hear from you!

Let's chat - my contact details are below.

*Barry Giske*

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