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TO DO LIST FOR DISSOLUTION CLIENTS

CLIENT NAME: ____

Case Number: ____________________________

DOCUMENTS TO GATHER:

___ 1. Federal and State tax returns for the last three (3) years.

___ 2. Last three (3) months of the most recent paycheck stubs.

___ 3. Last statement reflecting mortgage, home equity and 2^{nd} mortgage balance or payoff.

___ 4. Payoff value for all car loans.

___ 5. Declaration page on all life insurance policies reflecting cash value.

___ 6. Legal description of all real estate.

___ 7. VIN numbers and/or copies of all vehicle titles.

___ 8. The three (3) most recent statements of al investments, securities, IRAs, 401(k), pension, CDs, Bank statements, Money market or savings accounts.

___ 9. Last three months of credit card statement for each credit card or installment account.

___ 10. Statement reflecting the costs for any health insurance plan or statement from employer regarding monthly cost for you and children for the last twelve (12) months.

___ 11. The most recent balance statement for any existing debt owed by either party

___ 12. Any appraisals related to any marital or separate property done within the last twelve (12) months.

___13. ____

___14. ____