

## Brainstormingwomen

### Financial Information Checklist

#### Income:

- ✓ Paystubs, etc. most recent from all employment sources
- ✓ Last 3 years filed tax returns-personal and joint with any amendments

#### Expenses:

- ✓ Estimate pre-separation monthly housing expenses for you and children
- ✓ Estimate pre-separation monthly personal expenses for you and your children

#### Assets:

- ✓ Real Estate addresses, valuations, original closing documents, etc.
- ✓ Statements for checking, savings, money market and CD accounts, Savings bonds Investment and individual stock/bond account
- ✓ Retirement accounts including 401K, IRA, ROTH, SEP IRA, 403B, 457 Plans, Thrift Plans
- ✓ Pension plan statements and documents
- ✓ Closely held business statements, interest and debt obligations
- ✓ Stock options
- ✓ Corporate bonus and incentive plans
- ✓ Annuity holdings

#### Liabilities:

- ✓ Personal, auto, mortgage statement, home equity and school loans
- ✓ Credit card and any outstanding debt obligations
- ✓ Health insurance coverage and plan document