

## Preparing to Meet with Your Family Law Attorney

As you get ready for your first meeting with our office, you should prepare certain documents and information to bring with you. The information you provide will help us assess your situation and develop a plan that will be the best fit for your objectives. This list is a guide to help you get started. Not all items listed may be applicable to your situation, and we may ask you for additional information and/or documents not on this list as well.

### Financial Information (including account names, numbers, balances and current statements)

- Individual federal income tax returns for the past three years
- Business federal income tax returns for the past three years
- Income stubs for the last six months
- Bank statements for the last year
- Statements from trusts, stocks, bonds or US Treasury notes
- List of safety deposit box contents
- Investment accounts (annuities, mutual funds)

### Retirement Savings Information (including balances, beneficiaries, outstanding loans and current statements)

- 401(k)s
- 403(k)s
- IRAs
- Life Insurance policies (including cash value)
- Social Security statement
- Pension statement

### Property Information (including property description, address, ownership interest, market value, outstanding mortgage and loan balances, source of mortgage and loan payments and most recent tax assessment)

- Primary residence
- Rental properties (including any rental income)
- Vacation homes or time shares
- Business property
- Personal Property of value (antiques, collectibles, automobiles, jewelry, art, computers, electronics, clothing, furs, etc)
- Inheritance (current or anticipated)
- Interests in trust (current or future)
- List of property owned by each spouse prior to marriage
- Automobile(s), boat(s) or other recreational vehicle(s)

### Bills and Outstanding Debt (including balances, statements, source of payments/funds)

- Credit card statements
- Loan documents
- Utility bill
- Other bills (school tuition, medical bills, etc.)
- Monthly budget worksheet

#### Legal Agreements

- Wills
- Living wills
- Powers of attorney
- Durable powers of attorney
- Advance directives (also termed power of attorney for healthcare, healthcare proxy)
- Prenuptial agreements (also termed premarital agreement, antenuptial agreement)
- Divorce decrees or child support from a previous marriage