



## EQUITABLE DIVORCE SOLUTIONS, LLC

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### **List of Information and Documents Needed**

*The personal and financial data that you provide is used in all stages of analysis and negotiation. The information is used to determine the fair and equitable division of assets, as well as the terms and conditions for alimony and child support.*

#### **Personal Data:**

- Full name of both parties
- Full address and all phone numbers for both parties
- Birth date for each spouse
- Social security number for each spouse
- Date and place of marriage
- Copies of any prenuptial agreement
- Information regarding all affected children (complete names, dates of birth, Social security numbers, and addresses)
- Name and address of schools for all affected children
- Previous marriage history for either spouse, if applicable, including a certified copy of the divorce decree
- Information regarding any previous legal proceedings involving either party or their children
- Information about any previous separations, reconciliations, or marriage counseling.

#### **Financial Data:**

- Bank statements
- Investment and/or brokerage account statements
- Three years of personal tax returns and all associated schedules (regardless of filing status)
- Three years of business tax returns, if applicable
- Estimated tax payments, if applicable
- Real estate and personal property tax information
- Employment records including all income and benefits data (salary, bonuses, commissions, stock options, incentive compensation, deferred compensation)
- Self-employment data, if applicable (business records, partnership agreements, K1 Statements)
- Retirement plan statements
- Pension plan, profit sharing documents and statements
- Real estate deeds and mortgage information
- Will, estate and other trust documents
- Insurance policies (life, disability, health, property, auto, and umbrella)
- Personal credit report for both parties
- Current credit and loan applications
- Credit card statements
- List of personal property (e.g. real estate, vehicles, boats, household furniture, art, antiques, family heirlooms, inventory of safe deposit boxes, jewelry)
- List of expenses (household, personal, child, transportation, health and medical)