FINANCIAL DOCUMENTS

- Recorded Deeds for all real estate.
- Mortgage Principal Balance Statements for all real estate.
- Monthly Mortgage Payment Information, including Interest Rate information for all real estate.
- Monthly Home Equity Line Payment Information, including Interest Rate information for all real estate.
- Real Estate Appraisals.
- Recent Paycheck Stubs/Pay Statements for you and your spouse.
- Tax Returns for the last three years, including all W-2 Statements and 1099 Statements.
- Business Tax Returns.
- Business Financial Statements for current year.
- Any written agreements between you and your spouse, including Pre or Post Nuptial Agreements.
- Savings Account Statements for the past six months.
- Checking Account Statements for the past six months.
- Brokerage Account Statements for the past six months.
- Stock Option Statements.
- Retirement Plan Statements (401(k), 403(b), IRA, Defined Contribution, Money Purchase Pension Plan, Pension Plan, etc.,).
- Frequent Flyer Miles Statements.
- Credit Card Rewards Statements.
- Title to all vehicles.
- Information about each vehicle, including mileage.
- Credit Card Statements for the past six months.
- Loan Statements, including vehicle loan statements. If a vehicle is leased, the lease agreement.
- Life Insurance Policies and the most recent cash value statements.
- Health Insurance information, including premium cost information for yourself and family.
- Work related childcare information, including monthly cost.
- Benefit statements from your employer and your spouse’s employer.
- Safe deposit box information.
- Current estate planning documents.
- Social Security Benefit Statements.
- College Savings Information for your children.
- Social Security Numbers for all family members.