INTEGRIGEN
WEALTH MANAGEMENT

DOCUMENTS NEEDED FOR DIVORCE PLANNING

The following documents will be needed for study and analysis to create a financial strategy for the divorce. It is understood that this material should be treated confidentially.

Important Dates
Date of Marriage: Date of Birth: (H & W) Date of Retirement (H&W):

	Most Recent Payroll Stubs		**Insurance Policies and/or Statements**
	Include prior year K-1 if applicable		Life/Medical/Disability/Long-Term Care/Liability
	Cash Flow Worksheet		Auto & Home/Group Insurance
	(separate handout)		**Other Statements**
	2 yrs Federal & State Income Tax Returns		Military/VA Benefits
	(Include business returns as well)		Social Security Stmt (available at SSA.gov)
	Investments/Retirement Statements		Credit Report
	Pension/Profit Sharing		**Wills and Trusts**
	SEP/SIMPLE, Traditional IRA/ Roth IRA		**Business Documents**
	401k/ TSA/ PEDC		Buy-Sell Agreements
	Health Saving Accounts		Deferred Compensation Agreements
	College Savings 529 plans		Split Dollar/Wage Continuation Arrangements
	Stock (Employee Stock Ownership Accts)		Employee/Consulting
	Savings/Investments (cost basis included)		Group Benefit Programs
	Annuities		Other Employer Paid Benefits/Reimbursements
	Income Tax Refund or Tax Due		**Vehicle Information**
	Liabilities		Kelly Blue Book Value & Loan Stmts
	Current Mortgage Statements		Provide Drivers List & Vehicle Titles
	Current Credit Card Statements w/Balances		**Children's Account Statements (529 plans)**
	Student Loans		**Other Assets/Safety Deposit Box contents**
	Auto Loans		**Employee Benefit Statements/Booklets**
	Any other debt (ex., Home equity line, etc.)		Accrued PTO, sick leave/vacation

Additional Home information:
Current Title:
Original Purchase Price & Date:
Value of Improvements/Additions:
Current Fair Market Value:

Other Asset examples:
Jewelry/Artwork/Antiques/other valuables:
Credit Card Points/Frequent Flier Programs/Miles:
Season Tickets/Country or Health Club Memberships: