

Financial Documents to Provide

TAX AND INCOME

- Past 3 years' tax returns plus all attachments
- Past 3 years' w-2s for both clients
- Last 3 payroll stubs for both clients
- Social Security paystub, if receiving benefits

REAL ESTATE

- Estimated Fair Market Value Each Property
- Mortgage statement on above
- Property Taxes and Insurance Stmt (if not escrowed)
- Current statement for any Real Estate Investment Trust Assets

BANK ACCOUNTS

- Last 3 months' worth of statements for all bank account (checking, savings, money market and CDs)
- Series EE/Government Bonds-Inventory

CREDIT CARD/DEBT

- Last 3 months' worth of statements for all bank accounts
- Current statement for any personal debt
- Current statement for vehicle/boat debts

INVESTMENT ACCOUNTS

(after-tax accounts/non-retirement)

- Last 3 months' worth of statements for all investment and brokerage accounts
- Copies of Stock Certificates, if held direct
- Healthcare Savings Account(s): current statement
- Last 3 months' worth of statements for Cryptocurrency Accounts
- Current statement for any cash value life insurance policy

RETIREMENT ASSETS

- Social Security Benefit Estimates for both clients
- Pension estimate(s) or pension benefit statement if retired

Last 3 months' worth of statements for all the following

- **Employer Sponsored Plans (401k, 457, Non-Qualified Deferred Compensation, etc...)
- **IRA accounts
- **Beneficiary IRA Accounts
- **Annuities (statements and contracts, if applicable)

EMPLOYEE BENEFITS

Stock Options, Company Stock, RSUs and PSUs

- **current statement for each
- **grant award letters for each
- **vesting schedule for each
- Healthcare benefits statements
- COBRA cost or contact information
- Company expense card/account- last 3 statements
- Employer Benefit Book -most recent

PERSONAL PROPERTY

- Blue Book Estimates for all owned vehicles, boats, etc...
- List of Collectible, Antiques, Coin Collections, etc...
- List of Art

If you have any separate property claims, provide pre-marital value statement