

# *The Law Office of Brigid A. Duffield, P.C.*

Attorney/Mediator/Speaker/Author

*Dedicated to Providing a No BS Legal Experience*

1749 South Naperville Road, Suite 201  
Wheaton, Illinois 60189

E-Mail: [brigid@brigidduffield.com](mailto:brigid@brigidduffield.com)  
[www.brigidduffield.com](http://www.brigidduffield.com)

Telephone (630) 221-9300  
Facsimile (630) 221-9305

## ***PRE-DIVORCE INFORMATION NEEDED***

*Take a proactive stance by gathering and preparing the production of your financial information you will need for your case. By having these prepared before your meeting, you will save yourself time and money.*

### **A. Personal Information:**

- \_\_\_\_\_ Date of birth, yourself, spouse and children
- \_\_\_\_\_ Date of marriage
- \_\_\_\_\_ Social security number of all parties
- \_\_\_\_\_ Name and address of present employers
- \_\_\_\_\_ If previously divorced, copy of the decree and the current status on orders
- \_\_\_\_\_ Copy of will, if any

*Our office will need 3 copies of the following items (one for your lawyer, one for spouse's lawyer, and one for the judge). Save the originals for your records.*

### **B. Income Information:**

- \_\_\_\_\_ Income, verification of current income (paycheck stub or W-2 forms)
- \_\_\_\_\_ Tax information (both parties), filing status, number of dependents
- \_\_\_\_\_ Tax returns (last 3 years for both parties) showing income information and sources of assets
- \_\_\_\_\_ Comprehensive Financial Statement with attachments

### **C. Assets:**

- \_\_\_\_\_ Bank accounts - statements for the last 3 years from all checkings, savings, and money markets
- \_\_\_\_\_ Deed (of any real estate property owned)
- \_\_\_\_\_ Real estate appraisals
- \_\_\_\_\_ Employer benefit plans - name and phone number of person to contact for information
- \_\_\_\_\_ Retirement accounts, pension, 401(K), money markets, stocks, bonds, IRA's, tax-free municipal (pre and marital) - annual and quarterly statements
- \_\_\_\_\_ Life insurance policies - policy's financial information and cash value
- \_\_\_\_\_ Titles (auto, boat and motorcycle)- listing of equipment on each
- \_\_\_\_\_ Securities statements

**C. Assets (continued)**

- \_\_\_\_\_ Business interests documents
- \_\_\_\_\_ Estate or trust interests documents
- \_\_\_\_\_ Contents of safety deposit boxes
- \_\_\_\_\_ List of appraisers and professional advisors
- \_\_\_\_\_ Net worth statements, if any
- \_\_\_\_\_ Other investments

**D. Expenses:**

- \_\_\_\_\_ Expenses- prepare a comprehensive listing of all monthly expenses for yourself, your spouse and your children for the past twelve months, including household expenses (mortgage, utilities, phone, water, etc.)
- \_\_\_\_\_ Liabilities/debts (both parties)- statements for the last 3 years (credit cards, loans, medical)
- \_\_\_\_\_ Mortgage balances- total owed & monthly payments (including taxes & insurance)

**E. Additional Information:**

- \_\_\_\_\_ Take an inventory of the marital home by creating a list of the contents room by room. Video taping is effective as well. Categorize each item by source, cost, date of purchase and approximate value.
- \_\_\_\_\_ Identify assets acquired prior to the marriage or inherited property held separately during the marriage which may be non-marital.