REQUIRED DOCUMENTATION / INFORMATION

- Most Current Income Federal and State Income Tax Returns
  Personal (1 Year) & or Business – (3 Years) - Include W2s and or 1099s
- Any Other Sources of Monthly or Yearly Income
- 2 – Pay Statements (Most Current) for Both Parties or Unemployment Statement
- Social Security Statements, If applicable
- Recent Pension/ Retirement Plan Statements
  401K/403B/457 IRA, ROTH IRA Statements
- Bank Statements – All Accounts – Checking, Savings, HSA, FSA
- Installment Loan (I.E.-Car Loan or Lease) etc.
- Credit Card Statements – Not Paid off Each Month
- All Brokerage/Investment Statements
- Completed NYS Financial Workbook
- Mortgage/HELOC (Home Equity) Statements
- Vacation Property or Time Share, if applicable
- List of Any Accounts Owned Prior to Marriage – Balances @ Time of Marriage & Current Balance
- Pre-Nuptial or Post Nuptial Agreements
- Real Property (Home, Vacation, Time Share) – Comparative Mkt. Analysis or Appraisals, If applicable
- Outstanding IRS Debt
- Outstanding Medical Debt
- Student Loan Debt
- Current Credit Bureau Report – NOT CREDIT SCORE, REPORT SHOWING HOW MANY OPEN ACCOUNTS
- Health Insurance Information for Child (ren)
  - Copy of Ins. Card – Provider and Costs for Children's Health Insurance Premium
- Whole Life Insurance – Most Recent Statement – Cash Value? Death Benefit? Beneficiary
- Term Life Insurance – Duration? Death Benefit, Beneficiary