LAWSON FINANCIAL GROUP
Gray Divorce Financial Planning
(919) 247-3700
hello@LawsonFinancialGroup.com
LawsonFinancialGroup.com
Blog: *The Gray Girlfriends' Guide to Divorce*

DOCUMENT LIST

As we begin to work together, the assistance I can provide is directly dependent on you. I can only provide a thorough analysis if I have all of the information necessary to do so. Below is a list of documents you (and your spouse (if both of you are engaging our services) will need to provide as soon as possible. Scan and upload these documents to us via the secure Sharefile link provided in any of our emails. Don't feel the need to send everything at once. If it's easier to do a little at a time, that's fine.

1. If Financial Affidavits have already been completed, provide copies.
2. Fully Completed Client Data Sheets with Post-Divorce Budget estimates for each party.
3. **3 years of tax returns with all supporting schedules and W-2s**.
4. Last 3 month's statements on all investment accounts.
5. Last 3 month's statements for all bank accounts, checking and/or savings.
6. Most recent three statements from any employee retirement plan, pension, or deferred comp plan.
7. Most recent statement on any Employee Stock Option, Employee Stock Purchase Plan, or Restricted Stock accounts.
8. Most recent mortgage statement.
9. Most recent pay stubs for each party.
10. Last 3 month's statements for any and all credit cards with balances.
11. Copies of most recent statements for any outstanding loans.
12. Policy statements or information on any and all Life Insurance, Annuities, Cash Value Insurance.
13. Social Security Estimate statements for both parties. These are available at www.SSA.gov.
14. For any businesses owned, a full Profit and Loss Statement and Balance Sheet for current and previous 2 years.
15. For all autos owned - VIN numbers and current mileage on vehicle.