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# **Property & Financial Information – Divorce –**

# **Property Information -**

**Real estate** - location, mortgage, payments, purchase price, market value, use of property

**Accounts** - banks, credit unions, brokerage firms - account number, balance, liens, authorized signers, type account

**Securities** - stocks, bonds, money market - number, purchase date & price, market value, location, title name

**Vehicles** - year, make, model, lien, payments, name on title, market value

**Boats, airplanes, etc**. - year, make, model, lien, payments, name on title, market value

**Business interests** - corporations, partnerships, joint ventures – liabilities

**Life insurance, annuities** - type policy, carrier, beneficiary, owner, premiums, cash value

**Retirement benefits, employment benefits** - type of plan, eligibility requirements, dates acquired, pre/post tax contributions; company auto, company expense account

**Mineral interests** - oil, gas, etc. - type of interest, acquisition date, income, market value

**Intellectual property** – patents, trademarks, copyrights, etc.

**Collections** - stamps, coins, collectibles - market value, location

**Antiques** - furniture, rugs, etc. - market value, location

**Jewelry, furs, etc**. - market value, location, acquisition date & circumstances

**Artwork** - paintings, sculpture, etc. - market value, location, acquisition date & circumstances

**Furniture, fixtures** - market value, location

**Memberships, season tickets, etc**. - type of membership, market value

**Miscellaneous** - injury claims, tax refunds, trademarks, patents, musical instruments, equipment

**Inheritance** - date, assets acquired, market value, how acquired, location, current form

**Trusts** - date, assets acquired, market value, trustor, trust terms, current form

**Gifts to you, including those from your spouse** - date, assets acquired, market value

**Property** **owned jointly with third parties**

**Property held by your for the benefit of a third party**

**Property held by a third party for your benefit**

**Separate property** – assets acquired by gift, inheritance or owned prior to marriage - date & circumstances of acquisition, market value, location

**Assets your spouse does not know about**

**Property of child/children** - description, location, market value, documents

**Debts -**

**Charge accounts** - creditor, name on account, account number, balance, payments, items purchased

**Installment payments** - creditor, name on account, account number, balance, payments, items purchased

**Taxes, IRS claims** - income, property - amount, date due, terms

**Guaranties, contingent liabilities** - date, terms of liability, amount

**Support payments owed by you or your spouse** - alimony, child support - payment dates, termination date, amount

**Separate liabilities you incurred** – debts incurred prior to marriage or debt for which creditor agreed to look to only you for payment

**Separate liabilities your spouse incurred**

**Liabilities you have not disclosed to spouse**

**Financial Documents – Please Provide Any In Your Possession -**

**Financial statements prepared by you or your spouse** - date, purpose, location, conflicts in information

**Appraisals of property** - tax, insurance, etc. - date, purpose, location, conflicts in information

**Casualty insurance policies** - lists of property with values, scheduled items insured, etc.

**Income tax returns** – returns and related documents for the last several years

**Notes -**