

ORGANIZING YOUR DOCUMENTS

The following is a list of information and/or documents that will be useful, or perhaps even required, in your matter. Kindly gather this information and provide to my office, either in digital form or hard copy, along with a list of what you have provided.

1. All paycheck stubs for the current calendar year and the last paycheck stub for the immediately preceding calendar year.
2. All filed State and Federal Income Tax Returns for the previous three (3) years, including both personal returns and returns filed on behalf of any partnership or closely held corporation of which the party is a partner or shareholder.
3. All W-2 and Tax Statements; 1099 Forms and K-1 forms for any year in the past three (3) years which the party did not file State and Federal Income Tax Returns.
4. All statements of bank accounts received during the last three (3) years from each financial institution in which the party has maintained an account in which cash or securities are held. If you don't save your bank statements, at least provide me with the last bank account statement.
5. Statements pertaining to:
 - a. any policy of life insurance, whether it is a cash or dividend surrender value or not;
 - b. any deferred compensation plan of any type or nature in which the party has an interest, including but not limited to, Individual Retirement Accounts, pensions, profit-sharing plans, Keogh plans, 401(k) plans, 403b plans, and other retirement plans.
 - c. Any health insurance information.
6. The latest statement from:
 - a. Any mortgage
 - b. Any and all credit cards
 - c. Any and all car loans
 - d. Any other outstanding debt.

To do an excellent job of assisting you, we need to have a complete financial picture. In addition, it will expedite your case to organize all the materials at once, and if your case has to go to Court, the Court requires much of this information. Your cooperation is imperative. If you are unable to provide copies of the documents, our office will be happy to copy them for you, however, if we have to do the copying, an additional charge will be incurred on your account.

Thank you for your cooperation. Call us if you have any questions.