

Checklist: *Getting Organized*

If DIVORCE IS AT YOUR DOORSTEP, you need to develop an organizational system that will work for you – and prevent you from drowning in a sea of paperwork. You will save time, money, and lower your stress levels if you can put your hands on a document the moment your lawyer or CDFA™ asks for it. An accordion folder is a good way to keep everything in one place – and it's portable so your files can go with you to meetings. You will want to relabel some of the tabs so they're specific to your situation. For instance:

- Documents for my Lawyer*
- Documents from my Lawyer
- Documents for my CDFA™*
- Documents from my CDFA™
- To-Do Lists (click here for a sample To-Do List)

* **These documents would include items such as:**

1. Financial Statements/Affidavits for both parties (if available)
2. At least three years of income tax returns for both parties (if possible)
3. Details regarding investments
4. Employee benefit/retirement information
5. Information regarding your mortgage(s)
6. Most recent paycheck stubs for both parties (if possible)
7. List of assets
8. List of debts
9. Marital Property inventory and/or receipts
10. Non-Marital Property inventory and/or receipts
11. Household inventory (use the "Household Inventory Worksheet" to help with this)
12. Household bills and/or receipts
13. Bank account statements (joint and separate)
14. Credit card statements (joint and separate)
15. Child or spousal support (paid or received)
16. Insurance information
17. Any other documents that would have a bearing on your financial situation.

If you have never made a To-Do List, now's the time to start. There's simply too much to remember, and too much can fall through the cracks at this stressful time. There is computer software that can track tasks and appointments, or you can purchase a diary or appointment book that you will refer to every day. Make sure to put deadlines on everything: you don't want to keep your lawyer waiting for a document you promised last week because you forgot about it.

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We suggest that you discuss your specific situation with a qualified tax or legal advisor.

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