

FAMILY LAW
DOCUMENTS TO BRING TO
MEETING

1. Prior and present Wills, and any codicils
2. Copies of current bank statements
3. Last Three (3) Years Tax Returns
4. Copies of Security Agreements and Notes secured by personal property
5. Copies of Mortgages and Notes on any real property
6. Financial Statements submitted to lending institutions
7. Real and personal property tax bills
8. Deeds to all real property and oil, gas, and mineral interests
9. Government, municipal, and corporate bonds
10. Vehicle titles
11. Copy of current Brokerage Account Statement
12. Life and health insurance policies and annuities and summary of current owner and beneficiary provisions
13. Savings account passbooks, statements relating to certificates of deposit, money market certificates, and liquid daily asset accounts
14. Copies of any current bills and creditors' addresses
15. Prenuptial, postnuptial, or separation agreements
16. Stockholder or partnership agreements
17. Pension and profit-sharing plans and summary of current benefits
18. Copies of any existing Leases
19. Judgments of dissolution of prior marriages
20. Court orders or agreements under which client is obligated to provide support
21. Other documents that are pertinent to either property you own or debt that presently exists