

MARRIAGE

CHECKLIST: Documents to Show Your Family Law Attorney

Getting married is one of those life events that triggers a new set of legal needs and warrants a reassessment of some of the legal preparations for your future that you may have already made. You may want to enter into a prenuptial agreement, for instance, or modify your estate plan now that another person is involved in your life. In order to ensure the best possible representation, gather the following documents together and provide copies to your attorney, along with any others he or she specifically requests. By so doing, you can work together as partners to meet your changing legal needs now that you are married, for both the immediate and long-term future.

Check off each item as you gather the documents. If the does not apply to your situation, write in N/A.

- Individual income tax returns for past three to five years (federal, state, and local)
- Business income tax returns for past three to five years (federal, state, and local)
- Proof of your current income
- Proof of spouse's current income
- Prenuptial agreement, if already drafted
- Divorce decrees from previous marriages
- Bank statements
- Certificates of deposit
- Pension statements
- Retirement account statements
- Trusts
- Stock portfolios

- ___ Stock options
- ___ Mortgages
- ___ Property tax statements
- ___ Credit card statements
- ___ Loan documents
- ___ Utility bills
- ___ Other bills (e.g., school tuition, unreimbursed medical bills, etc.)
- ___ Monthly budget worksheet
- ___ Completed financial statements
- ___ Employment contracts
- ___ Benefits statements
- ___ Life insurance policies
- ___ Health insurance policies
- ___ Homeowner's insurance policies
- ___ Automobile insurance policies
- ___ Personal property appraisals
- ___ Real property appraisals
- ___ List of personal property, including home furnishings, jewelry, artwork, computers, home office equipment, clothing and furs, etc.
- ___ List of property owned by each spouse prior to marriage
- ___ List of contents of safety deposit boxes
- ___ Wills
- ___ Living Wills

___ Powers of Attorney

___ Durable Powers of Attorney

___ Advance Health Care Directives