



OKLAHOMA ACADEMY OF COLLABORATIVE PROFESSIONALS

Collaborative Practice Information to Gather Checklist

- ☐ **Your spouse will be gathering this same information.**
- ☐ **Your spouse will get a similar checklist from his or her lawyer.**
- ☐ **Please give your spouse any of these documents that you have but he or she doesn't have, so he or she can complete his or her own checklist.**

Gather these documents, if they apply to you, and bring them with you to help us prepare for our first four-way meeting.

_____ Insurance policy declarations page (whole life, term life, long term disability)

_____ Cash surrender value statements for any whole life insurance;

_____ Pay stubs for 3 months;

_____ Employment Contract, Collective Agreement or Employment Handbook with employment benefits;

_____ Current employment pension plan statement;

_____ Tax returns for 3 years;

_____ Brokerage statement, stock option agreements and any other investment statements for the last 6 months or from date of separation to the present time, whichever is longer;

_____ Copy of any financial statement(s) provided to anyone in last 3 years;

_____ Copy of deed to house and any other real estate owned;

_____ Copy of appraisal for any real estate, if you have or your bank one;

_____ List of any safety deposit box contents;

_____ List of vehicles, with VINs, and appraisals, if any;

_____ Jewelry and art appraisals, if any;

_____ Current loan and mortgage statements;

_____ Copy of all Promissory Notes and Personal Guarantees you have signed;

_____ Credit card statements for all credit cards, for the last 3 months;

_____ Any court papers relating to your marriage or your family;

_____ Any other information you may have about assets, debts or property you owned before you got married;

_____ 3 years corporate financial statements, corporate tax returns and assessment notices, and 6 months of corporate bank statements;

_____ Your estimated budget;

_____ Any special expenses for your children.