



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 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 label the tabs so they're specific to your situation. For instance:

- ☐ Documents For My Lawyer*
- ☐ Documents From My Lawyer
- ☐ To-Do Lists

* Documents for your lawyer would include items such as:

1. Financial statements 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 paystubs 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; and
17. Any other documents that would have a bearing on your financial situation.

If you've never used a to-do list before, now is the perfect time to start. With so much happening during this stressful period, it's easy for important tasks to slip through the cracks. Consider using task management software to track your responsibilities and appointments, or simply keep a daily planner or appointment book you'll check regularly. Be sure to assign deadlines to everything—missing one could delay your case, especially if your attorney is waiting on a document you forgot to send.