

Marriage Separation Checklist

Information to Gather:

- Full names of parties
- Date and place of marriage
- Social Security Numbers of family members
- Names and dates of birth of children
- Any health and dental insurance information
- Pets (papers proving ownership, veterinary records, etc.)

Discuss the Following:

Children

- Legal and/or physical custody of children
- Access to Children by parent and other relatives
- Notification of Illness and Other Events
- Religion/Religious Training
- Child support and amount
- Establishing payments
- Child care costs
- Cost of activities
- Tax deductions

Alimony

- Waiver of future alimony
- Amount of alimony

Taxes

- Filing taxes
- Cooperation if joint filing
- Use and reporting of available deductions
- Division of refund or liability

Assets and Debts

- Division of property and assets
- Types of debt including loans, medical bills, credit cards, and others
- Use and possession of home by both parties
- Inventory of assets and debts
- Allocation of responsibility for debts, including debts incurred after separation

Get Copies of Important Documents

If you don't have the original, make sure you at least have copies of the following documents:

Assets and Liabilities

- Tax returns
- Credit card information and statements
- Mortgage for home as well as property description and form of ownership
- Checking and savings account statements
- Car titles and loan documents
- Deeds to other property as well as the property addresses and form of ownership

Estate Planning

- Wills and/or power of attorney
- Retirement plan statements
- Life insurance policies

Other

- Marriage certificate