

Checklist of Financial Disclosure Items

Common items that generally are required to be disclosed in divorce proceedings.

Income & Assets

- Employment income (e.g., salary, bonus)
- Bank account balances (e.g., checking, savings)
- Investment account balances
- Investment income (e.g., interest, rental income)
- Future employment income (e.g., deferred compensation awards, stock options)
- Retirement account balances (e.g., pensions, 401(k)s, IRAs, Social Security)
- Education savings account balances (e.g., 529s)
- Health savings account balances (e.g., FSAs, HSAs)
- Cash-value insurance policies and annuities (e.g., whole life)
- Vehicles (e.g., automobiles, recreational vehicles)
- Real estate holdings (e.g., primary residence, vacation home, time share, investment property)
- Private business interests
- Memberships and licenses (e.g., private club, golf club, fractional jet share, season ticket rights, rewards points, and frequent flyer miles)
- Intellectual property (e.g., patents)
- Personal property (e.g., clothing and jewelry, furnishings, art, antiques, wine, liquor)
- Digital property (e.g., domain names, social media accounts, websites)
- Other investments/private capital

Expenses & Liabilities

- Credit card balances
- Monthly household costs (e.g., food, utilities)
- Education expenses
- Healthcare expenses
- Activity and hobby expenses (e.g., kids sports, camps)
- Tax liabilities (state and federal)
- Insurance premiums
- Outstanding medical bills
- Student loans
- Personal loans
- Mortgage loans
- Home equity loans
- Vehicle loans