

## VERY IMPORTANT

### DOCUMENT REQUIREMENTS

A. Due by \_\_\_\_\_, you must provide us with the originals or legible copies of the following documentation & information. If you are providing copies please state why you cannot produce originals.

1. Complete list of all individuals having knowledge of relevant facts. List must include full legal name, address, telephone number, and relationship to party.
2. Complete copy of any witness statements.
3. Complete Income tax returns for the past two years, including W-2(s), all schedules and attachments.
4. Your five most recent payroll stubs or equivalent if you do not have access to payroll stubs.
5. All documents pertaining to real estate, including deed(s), deed(s) of trust, promissory notes, mortgage statements & the packet received at the closings for each piece of real estate.
6. All documents pertaining to any pension, retirement, profit-sharing, or other employee benefit plan of either spouse, together with the most recent account statements for any plan.
7. All documents pertaining to any life, casualty, liability, and health insurance, insuring you, your spouse or children (under 18 years of age), and all property including house, contents, vehicles, etc.
8. The most recent account statement pertaining to any account located with any financial institution including, but not limited to, banks, savings & loans, credit unions, and brokerage firms.

If children or spousal support might be an issue, you must also provide us with copies of the following:

9. All policies, statements, and summary descriptions of benefits for any and all medical and health insurance coverage that is or would be available for the child or your spouse.

B. The Financial Information Statement contained in this package must be completed and returned to McNamara Law Office. The **Inventory & Appraisal** worksheets must also be completed and returned to McNamara Law Office. *The deadlines for each of these documents can vary based on your case. Please ask us when they are due.*

\_\_\_\_\_

Date

\_\_\_\_\_

Signature