

List of financial documents and information to bring to the first meeting
with Attorney Julia Rueschemeyer:

1. Copy of your most recent **paystub** (or a typical recent paystub if the most recent one isn't typical).
2. **W-2** for the most recent tax year.
3. Proof of any **other income**, including social security, disability, or retirement
4. If either of you is **self-employed** or has **rental income**, bring your **1040** for the most recent tax year (I don't need to keep a copy). If you don't have your 1040 and either of you is self-employed, bring taxes and any other tax return for a business which shows your income, including Schedule C and (if you have rental property income) Schedule E.
5. List of **retirement accounts**. For each account, provide the name of the account and the amount in it.
6. Information about **traditional pension(s)** (common among teachers and public employees), if any. We can get a much better sense of the present value of your pension if you get an answer to the following question from your pension administrator before our meeting: "How much would my monthly benefit be at retirement if I stopped working *now*, but waited until *normal retirement age* to start collecting the benefit."
7. List of **savings or checking accounts**, with name of bank and approximate amount of money in the account.
8. List of **debts**, including credit card debt. Include the amount owed and the name of the company you owe it to.
9. Amounts owing on **car loans**.
10. **Value of cars**. You can look up the 'private party value' at kbb.com or NADA.com or simply agree on an approximate value.
11. 'Fair market value' *and* the 'tax assessed value' of **houses or other real estate** that is in either or both of your names.
12. The amount of any **mortgage** owing on properties you own.
13. The approximate **number of years** that each of you has **paid into Social Security** (You can get an exact number by creating a "my social security account" at <https://www.ssa.gov/myaccount>, but it takes some time and effort to set up passwords for the site).
14. Any **prenuptial agreement** you might have (not common).
15. **Check, cash, or credit card** to pay Attorney Rueschemeyer

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Financial Statement Expenses

The court “Financial Statements” forms require **approximate** amounts for each of the categories in the chart below. If you fill this chart out ahead of time and bring it to our first meeting, it can save us a little time (and save you a little money). Each spouse should fill out their own sheet.

The only categories where you should try to be accurate are “**m) Medical insurance**” and “**r) Child care**”, as these numbers can affect child support calculations. I will discuss these particular categories with you at our meeting. The numbers entered for other categories *do not normally play any role in an uncontested divorce*, so don’t spend much time trying to get them exact.

- You should only make one entry in each row. Enter a weekly OR monthly OR yearly amount for each category, whichever is easiest for a particular category. For example, you might enter a “Per Week” grocery amount, a “Per Month” rent amount, and a “Per Year” homeowner’s insurance amount.
- Do *not* include, on this sheet, amounts that are pulled directly out of your paycheck (such as medical insurance, for many people).
- If you or your spouse pays one of these expenses out of a joint account, each spouse should list *half* the total amount for that category on their own sheet.

Your name _____

| | Expense Category | Per Week or | Per Month or | Per Year |
|----|---|-------------|--------------|----------|
| a) | Rent or Mortgage (if mortgage, include taxes) | | | |
| b) | Homeowners/Tenant Insurance | | | |
| c) | House Maintenance and Repair | | | |
| d) | Heat | | | |
| e) | Electricity and/or Gas | | | |
| f) | Telephone | | | |
| g) | Water/Sewer | | | |
| h) | Food | | | |
| i) | House Supplies | | | |
| j) | Laundry and Cleaning | | | |
| k) | Clothing | | | |

| | Expense Category | Per Week or | Per Month or | Per Year |
|-----------|----------------------------|--------------------|---------------------|-----------------|
| | | | | |
| m) | Medical Insurance | | | |
| n) | Uninsured Medicals | | | |
| o) | Incidentals and Toiletries | | | |
| p) | Motor Vehicle Expenses | | | |
| q) | Motor Vehicle Payment | | | |
| r) | Child Care | | | |
| s) | Other (specify) | | | |
| 1) | Other (specify) | | | |
| | | | | |
| 2) | Other (specify) | | | |
| | | | | |
| 3) | Other (specify) | | | |