

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 time and effort to set up passwords for the site).
14. Any **prenuptial agreement** you might have (not common).
15. If health insurance from your job covers your spouse, **ask your Human Resources person this question**: "Can my spouse stay on my health insurance after my divorce if there is a Court Order to keep them on it?" (This question is for information—even if your spouse *could* stay on it, it does not mean that your divorce agreement will keep them on it.)
16. **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).

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			
	<i>(continued on next page)</i>			

	Expense Category	Per Week or	Per Month or	Per Year
m)	Medical Insurance (amounts that are <i>not</i> deducted directly from paycheck)			
n)	Uninsured Medicals			
o)	Incidentals and Toiletries			
	Motor Vehicle Expenses			
	i) Insurance			
	ii) Gas			
p)	iii) Maintenance			
q)	Motor Vehicle Loan Payment			
r)	Child Care			
s)	Other (specify) _____			
1)	Other (specify)			
2)	Other (specify)			
3)	Other (specify)			