

List of financial documents and information you will need to consult in order to fill out the pre-meeting questionnaire for Attorney Julia Rueschemeyer:

1. Your most recent paystub (or a typical recent paystub if the most recent one isn't typical). You should share a copy with Attorney Rueschemeyer.
2. W-2 for the most recent tax year, if possible.
3. Statements documenting other income, such as social security, disability, or retirement.
4. If either of you is self-employed or has rental income, be prepared to share your 1040 Schedule C (business) or E (rental income) for the most recent tax year.
5. Exact names of retirement account and the balance (amount of money) in each one.
6. Information about pension(s), if any
7. Names of all bank accounts and the balances in each one.
8. List of debts, including credit card debt. You will need the amounts owed and the names of the companies you owe money to.
9. Amounts owing on car loans
10. Value of cars. You can look up the 'private party value' at [kbb.com](http://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—Zillow is an easy way to access this information.
12. The amount of any mortgage owing on properties you own and the names of the banks.
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).

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<http://www.AmherstDivorce.com>