

Financial document checklist

Preparation for a lawyer consultation, not legal advice or a prenuptial or postnuptial agreement. Rules depend on the state and country. Work with a family-law attorney to draft and review your agreement; each partner should have independent counsel. This tool does not provide signing or guarantee enforceability.

Complete offline. Do not include account numbers, SSNs, passwords, or full addresses. This list does not replace financial disclosure prepared with counsel.

Field	Your notes
Assets and estimated values	
Debts and obligations	
Income sources	
Businesses and ownership interests	
Retirement savings	
Inheritances and gifts	
Documents to share securely with counsel	
Questions about uncertain valuations or obligations	

Original educational worksheet by Clear About Us / DowidAI