

# Important Documents

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- Prenuptial/postnuptial agreement
- Income tax returns – 3 to 5 years: personal and business
- Pay stubs
- Bank statement – checking, savings, money market, CD's
- Savings bonds/cash in safety deposit boxes/safes
- Check registers
- Credit card statement – identify spending: day care, cabs, etc.
- Receipts
- Loan documents
- Retirement plan statements/documents – 401K, 403b, 457, pension plans
- IRAs
- Employment agreement
- Stock option statement/restricted stock/stock grants
- Deferred compensation – corporate bonus plans, incentive comp, ??
- Insurance policies – term, universal, and whole life
- Brokerage/investment statements/Real Estate Investments Trusts (REITs)
- Annuities
- Balance sheets
- Credit/loan/bank applications
- Real estate titles: residences, investments, timeshares
- Business interests: Sole Proprietorship, Partnership, Limited Liability (LLC), Limited Liability Partnership (LLP)
- Art collections, gold coins, stamp collections
- Loans to family members/friends
- Wills/Trusts/Powers of Attorney (POA) forms

