Client Name: ____________________ Case No. ________________

DISCOVERY CHECKLIST

These are the documents I need you to provide to my office by ____________________.

Document	Date Completed
Your paystubs for the last 5 months	
Tax returns for the last 3 years (including W-2s, 1099s, K-1s)	
Bank statements for the last 12 months (Checking, Savings, Money Market, Certificates of Deposit, etc)	
Monthly Statements for Credit Card(s), Mortgage(s), Auto Loan Statements, & promissory notes for the last 12 months	
Loan applications and financial statements from the last 12 months	
Property deeds from the last 3 years and present lease(s)	
Profit sharing, pension, and retirement plan statements	
Life insurance policies and copies of policy statements for the past 12 months	
Brokerage Acct Statements for the last 12 months and copies of stocks and/or bonds	
Corporate/Business tax returns and current Profit & Loss Statement	
Premarital/Marital agreements	
Child support and alimony court orders	
Health/Dental insurance information and cards	

Include all documents, whether held individually, jointly with any person or entity, in trust, or in another's name for your behalf

PARTIES HAVE A CONTINUING DUTY TO SUPPLEMENT DOCUMENTS IN THIS RULE WHENEVER A MATERIAL CHANGE IN FINANCIAL STATUS OCCURS

GROSSMAN LAW
& CONFLICT MANAGEMENT