

# Copy Cat Worksheet

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Provided by The Modern Woman's Divorce Guide ~ [www.moddivorce.com](http://www.moddivorce.com)

Use this as a checklist of documents you may want to copy or scan to disk (to reduce waste and protect the environment). If you want to minimize copying, ask your lawyer which documents she recommends you copy, and for what period of time.

## Husb. Wife

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|-------|-------|--|
| _____ | _____ | Annuity statements   |
| _____ | _____ | Appraisals   |
| _____ | _____ | Agreements regarding your property                           |
| _____ | _____ | Automobile Certificates of Title                             |
| _____ | _____ | Bills for living expenses                                    |
| _____ | _____ | Bond certificates  |
| _____ | _____ | Brokerage statements — personal and business                 |
| _____ | _____ | Business agreements (corporate, LLC, partnership agreements) |
| _____ | _____ | Cancelled checks — ask your lawyer if you need to copy these |
| _____ | _____ | Cash management accounts                                     |
| _____ | _____ | Certificates of deposit                                      |
| _____ | _____ | Checking account statements                                  |
| _____ | _____ | Check registers — personal and business                      |
| _____ | _____ | Children's college and custodial accounts                    |
| _____ | _____ | Commodity account statements                                 |
| _____ | _____ | Copyright records  |
| _____ | _____ | Court judgments  |
| _____ | _____ | Credit card statements — personal and business               |
| _____ | _____ | Credit reports   |
| _____ | _____ | Credit union account statements                              |
| _____ | _____ | Defined benefit plans  |
| _____ | _____ | Employee/group insurance benefit statements                  |
| _____ | _____ | Employee stock ownership plans (ESOPs)                       |
| _____ | _____ | Employment agreements  |
| _____ | _____ | Estate planning documents (e.g. living trusts, wills, etc.)  |
| _____ | _____ | Employee benefit statements                                  |
| _____ | _____ | Financial statements (asset/debt, income/expense, net worth) |

**Husb. Wife**

- \_\_\_\_\_ \_\_\_\_\_ IRA, SEP-IRA, Roth IRA statements
- \_\_\_\_\_ \_\_\_\_\_ Insurance policies (e.g. auto, health, liability, life, etc.)
- \_\_\_\_\_ \_\_\_\_\_ Inventories (e.g. art, business assets, wine, etc.)
- \_\_\_\_\_ \_\_\_\_\_ Keogh statements
- \_\_\_\_\_ \_\_\_\_\_ Loan applications (e.g. autos, home equity, mortgage, personal, etc.)
- \_\_\_\_\_ \_\_\_\_\_ Membership applications (e.g. country clubs)
- \_\_\_\_\_ \_\_\_\_\_ Mortgage documents
- \_\_\_\_\_ \_\_\_\_\_ Mutual fund statements - personal and business
- \_\_\_\_\_ \_\_\_\_\_ Patent ownership or registration documents
- \_\_\_\_\_ \_\_\_\_\_ Pay stubs
- \_\_\_\_\_ \_\_\_\_\_ Powers of attorney
- \_\_\_\_\_ \_\_\_\_\_ Prenuptial and/or post-nuptial agreements
- \_\_\_\_\_ \_\_\_\_\_ Profit-sharing plan statements
- \_\_\_\_\_ \_\_\_\_\_ Real estate lease and/or purchase agreements
- \_\_\_\_\_ \_\_\_\_\_ Real property deeds (e.g. title to your house)
- \_\_\_\_\_ \_\_\_\_\_ Real property tax assessments/bills
- \_\_\_\_\_ \_\_\_\_\_ Receipts for major purchases and/or expenses
- \_\_\_\_\_ \_\_\_\_\_ Résumés
- \_\_\_\_\_ \_\_\_\_\_ Retirement account statements (e.g. 401(k), 403(b) and 457 plans)
- \_\_\_\_\_ \_\_\_\_\_ Royalty agreements
- \_\_\_\_\_ \_\_\_\_\_ Savings account statements
- \_\_\_\_\_ \_\_\_\_\_ Servicemark documents
- \_\_\_\_\_ \_\_\_\_\_ Stock certificates
- \_\_\_\_\_ \_\_\_\_\_ Tax-free investment statements
- \_\_\_\_\_ \_\_\_\_\_ Tax returns (federal, state, personal, business, income and gift)
- \_\_\_\_\_ \_\_\_\_\_ Tax-sheltered annuities (TSAs)
- \_\_\_\_\_ \_\_\_\_\_ Title reports
- \_\_\_\_\_ \_\_\_\_\_ Trademark documents

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Disclaimer: The contents of this document should not be used as a substitute for competent legal advice from a licensed lawyer, doctor or therapist. Please consult a licensed lawyer, doctor or therapist who is familiar with your case and your state's laws.