

What Documents Do We Need?

Make sure both of you have access to all financial records and that you update them regularly.

No matter where you are in a long-term relationship – just starting out, celebrating decades of anniversaries, or considering divorce – if you really want to achieve equality, you need to know what you have as a couple, what you owe, and where to find documentation. Organize and update essential financial, legal, and health information. Maintaining good paper files and online documentation will save you lots of frustration and time when someone asks you for a birth certificate or a credit card record. It may also save you lots of money!

For each of these files, keep the originals or copies in a safe place in your home or office, in a safe-deposit box, or with a trusted family member. For online information, make sure both of you have the passwords for all shared accounts and know how to access each policy. Consider putting a list of the online accounts and passwords in a safe-deposit box as well.

Checklist

Financial information

- Bank statements and cancelled checks
- Bank Certificates of Deposit
- Brokerage account statements
- Credit card accounts
- Loan documents and statement
- Mortgage applications and repayment records
- Pay stubs for the last six months
for you and your partner
- Tax filings and refunds
- Business Financial Statements
- Employee benefit records including stock options and
bonuses
- Statements of all retirement accounts
- Royalty statements and advances
- Debts and related information
- Business Partnerships

Legal Documents

- Birth certificates
- Marriage Certificate, Living Together Agreement,
Cohabitation Agreement,
or Domestic Partnership documents
- Passports
- Social Security
- Wills and trust documents
- Pre- and post-marital agreements
- Previous divorce settlements
- Any pending legal actions
- Records of inheritance

Property

- Titles
- Mortgage agreements and payment records
- Original purchase documents
- Appraisals
- List of collectibles, jewelry, artwork, other valuables
(include photos for identification or insurance)
- Vehicle registrations
- Insurance policies

Expenses

- Household
- Education
- Childcare
- Children's After-School Activities
- Clothing
- Leisure activities and vacations
- Church and charitable donations
- Laundry and cleaning expenses
- Household help
- Transportation

Safety Deposit Box

- Information
- Extra key

Other

- _____
- _____

Money + Relationships + Equality: Finance + Romance through the Life Course
For more information, check out the resources section of our website or our workbook, *Equal from the Start*.