

CHECKLIST

AUTHOR: JUDITH JORDAN, FAMILY & COLLABORATIVE LAWYER

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In order to assist me in advising you it would be helpful for you to attend your first appointment with me, with the information and documents referred to in the Checklist appearing below. Please don't be daunted by the list as not all of it will apply to your matter. The list is designed to help you turn your mind to the type of information that may be needed to fully advise you. It may even help you to remember things you had forgotten that may improve your position in negotiations.

I suggest you print the Checklist off to guide you in gathering together information and important documents that will assist in the progress of your matter. The list is not exhaustive and if there are any other documents of a financial nature that you may need to rely upon in the course of your matter such as copies of Caveats or loan documents, then these should also be brought with you.

The list will help me to tailor my advice to you when we meet. Completing it may also help you to feel as though you are taking steps forward in gaining some objectivity and control over the relationship ending.

No.	Name of document/ information	Copy attached or date	Additional information or Information not in possession of client and needing to be obtained
1	Your full name and date of birth		
2	Your partners full name and date of birth		
3	Your full contact details		
4	Your occupation and annual gross income		
5	Your partners contact details or those of their solicitor [if known]		
6	Your partners occupation and annual gross income		
7	Statement of Benefit from Centrelink		
8	Marriage Certificate (if applicable)		
9	Birth Certificates of children (if applicable)		
10	The date you started living with your partner		
11	The date of marriage [where applicable]		
12	The date of separation		
13	Full names and date of birth of children [Child 1]		
	[Child 2]		
	[Child 3]		
	[Child 4]		
	[Child 5]		
17	Your most recent superannuation statement As above for any other of your funds		
18	Most recent superannuation benefit statement [s] of the other party or name of fund [s]		
19	Address of family home and estimated current market value and names on title		

No.	Name of document/ information	Copy attached or date	Additional information or Information not in possession of client and needing to be obtained
20	Address of investment property and estimated current market value and names on title		
21	Motor vehicle registration details car 1		
	Motor vehicle registration details car 2		
22	Details of any other vehicle [trailer, boat caravan etc]		
23	Internet Red Book estimated second hand value of all motor vehicles [1]		
	As above – vehicle 2		
	As above – vehicle 3		
24	Share Certificates and or details of shares held by you.		
25	Share Certificates and or details of shares held by other party.		
26	Current Term Investment details for you or jointly with other party.		
	As above		
27	Past Term Investment Details		
	As above		
28	Most recent bank statements of yours or jointly with other party		
	As above		
29	Bank Statements for 12 months before Separation for all accounts that you have access to: Account 1		
	Account 2		
	Account 3		
30	Credit Card Statements for the last year. Card 1.		
	Credit Card 2.		
31	Mortgage details, statement and current outstanding balance on family home		

No.	Name of document/ information	Copy attached or date	Additional information or Information not in possession of client and needing to be obtained
	Mortgage details, statement and current outstanding balance on investment property		
32	Life Insurance documents/ details (only those with cash in value) for both parties		
33	Real estate agent appraisals of real estate		
34	Appraisals of jewellery		
35	Valuations of real estate		
36	Valuations of jewellery		
37	Appraisals of any antiques		
38	Valuations of antiques		
39	Medical certificates (if relevant)		
40	Psychiatric reports (if relevant)		
41	Medical reports (if relevant)		
42	Copy of any current or past Court Order		
43	Copy of any Court documents served upon you in the matter		
44	Mediation Certificate children's matter (if applicable)		
45	Draft or executed Parenting Plan (relevant to children's matter)		
46	Details of any monies owed to either of you and by whom		
47	Details of any substantial gifts or inheritances received by either of you during the relationship		
48	Details of any compensation or work termination package received by either party during the relationship		
49	Details of your current will		

No.	Name of document/ information	Copy attached or date	Additional information or Information not in possession of client and needing to be obtained
50	Details concerning any anticipated future financial windfall [eg inheritance or financial pay out from an injury or work separation package]		
51	Any other document or information you think may be of use		

By working through the above list, you will quickly discern which information and documents you have in your possession, and what you may yet be able to obtain and the documents and information that will have to be requested from the other party to assist in giving you advice in due course.