

When Separating

Property checklist for legal advice

The following documents may be useful in preparing to divide your property. If you are using a lawyer to assist with your property settlement, you should provide them with copies of these documents. Remember to organise the documents into a logical order (for example, by account number and in date order) as this will save both time and legal costs.

- Personal income tax returns and assessments for the past three financial years
- Any business tax returns, financial statements and assessments for a business or partnership that you or the other party may have an interest in
- Balance sheets or profit and loss statements for any companies that you or the other party may be a shareholder or director of
- Yours and the other party's payslips from 1 July of the current tax year, or a minimum of two recent payslips
- Yours and the other party's bank account statements (held individually or jointly)
- Details of any stockbroker, financial planner or accountants involved in your financial affairs
- A current balance of any bank accounts, including savings, loans, and credit cards including account numbers, and in whose names the accounts are held
- Registration certificates of all vehicles owned by you and the other party (held individually or jointly)
- Copies of life insurance policies
- Copies of household insurance policies
- Copies of all superannuation fund documents relating to you and the other party either jointly or separately
- A list and estimated value of household contents and furniture (note most household items are given a "garage sale" value unless they are an antique or of special value)
- A copy of any Will that you or the other party may be a beneficiary to
- A copy of any trust deeds that may be applicable including any tax returns for the trust for the past three years
- The addresses, title and mortgage documentation relating to all real estate owned by you and the other party jointly or separately
- Copies of electricity, gas, council and water rates and other outgoings in relation to all real estate owned by you and the other party jointly or separately
- Any copies of recent real estate appraisals
- Information regarding any shares and other securities owned by you and your partner jointly or individually
- A list of all outstanding bills owed by you or the other party individually or jointly
- Any divorce decrees, applications, financial statements and affidavits if you or the other party have previously been divorced

- Any other information that will help establish yours and the other party's current financial status including income at the beginning of cohabitation and currently
- A copy of any existing written agreement that you and the other party may have entered into concerning maintenance, property, or other financial matters

Need more? Go to: www.whenseparating.legalaid.wa.gov.au