

Marital Financial Resources and Assets Checklist

When the time comes to separate it can be hard to keep track of all of the information you'll need about your marital finances and assets. While you may not need a lot of the information on this list until later, it can be easier to access while you're still living in the family home, so try to get your hands on as much of it as possible. You should try to make copies of as many of the documents on this checklist as you can, but at the very least, ensure that you have account numbers and policy numbers for future reference.

✓	Document	Account/policy number	Account/policy balance	Additional information
	Legal			
	Pre or post-nuptial agreement			
	Wills			
	Power of Attorney			
	Enduring Power of Attorney			
	Trust documents			
	Binding Financial Agreements			
	Other			
	Income and tax			
	Pay slips			
	Previous tax returns			
	Other			
	Banking			
	Joint transaction account/s			
	Joint savings account/s			
	Joint term deposit account/s			
	Joint cheque account/s			
	Personal transaction account/s			
	Personal savings account/s			
	Personal term deposit account/s			
	Personal cheque account/s			
	Child/ren's custodial savings account/s			
	Other			
	Non-property investments			
	Broker's accounts			
	Share certificates			
	Superannuation statements			
	Other			
	Property investments			
	Mortgage statement/s			
	Title deed/s			
	Other			

