

## What Should I Bring With Me to my Initial Consultation With a Divorce Lawyer

At this point you are familiar and confident in your lawyer's qualifications and experience, and so now its down to business. You're about to get started on one of the most challenging adventures of your life! Your lawyer is your advocate and your counselor-at-law who will help navigate merciless seas towards the calming comfort of better days!

Communicate with your lawyer efficiently. Make note of your questions and bring those notes, any pertinent documents and perhaps a list of questions you have. Have all your questions answered at once rather than over the course of multiple communications that tend to cause confusion and unneeded expense.

During your initial interaction/consultation your lawyer will ask questions because your lawyer is trying to understand you and learn your objectives. The lawyer is also trying to measure the merits of your case by analyzing your facts and perspective, and comparing the facts and your objectives to the law. A client should not hire a lawyer who they are not comfortable speaking with, and most lawyers will not accept representation of a client with unreasonable expectations, or maintain an attorney-client relationship without total trust and honesty.

Once you have chosen the lawyer you want to hire to represent you in your divorce, you will need to begin the process of gathering documents that will be required during the process. A list of the documents your lawyer will need from you within the first ten (10) days is as follows:

- a. All personal (1040) federal and state tax income returns, gift tax returns, and intangible personal property tax returns for the preceding 3 years; IRS forms W-2, 1099, and K-1 for the past year because the income tax return for the past year has not been prepared.
- b. pay stubs or other evidence of earned income for the 3 months before the service of the financial affidavit.
- c. A statement identifying the source and amount of all income for the 3 months before the service of the financial affidavit, if not reflected on the pay stubs produced.
- d. All loan applications and financial statements prepared for any purpose or used for any purpose within the 12 months preceding the service of the financial affidavit.
- e. All deeds to real estate in which I presently own or owned an interest within the past 3 years. All promissory notes in which I presently own or owned an interest within the last 12 months. All present leases in which I own an interest.

- f. All periodic statements for the last 3 months for all checking accounts and for the last year for all savings accounts, money market funds, certificates of deposit, etc.
- g. All brokerage account statements for the last 12 months.
- h. Most recent statement for any pension, profit sharing, deferred compensation, or retirement plan (for example, IRA, 401(k), 403(b), SEP, KEOGH, etc.) and summary plan description for any such plan in which I am a participant or alternate payee.
- i. The declarations page, the last periodic statement, and the certificate for any group insurance for all life insurance policies insuring my life or the life of my spouse.
- j. All health and dental insurance cards covering either of me or my spouse and/or our dependent child(ren).
- k. Corporate, partnership, and trust tax returns for the last 3 tax years, in which I have an ownership or interest greater than or equal to 30%.
- l. All credit card and charge account statements and other records showing my(our) indebtedness as of the date of the filing of this action and for the prior 3 months. All promissory notes on which I presently owe or owed within the past year. All lease agreements I presently owe.
- m. All premarital and marital agreements between the parties to this case.
- n. All documents and tangible evidence relating to claims for special equity or nonmarital status of an asset or debt.
- o. Any court order directing that I pay or receive spousal support (alimony) or child support.

By furnishing us these documents right away, it helps us begin to gather information sooner than later which means that we can provide preliminary financial analysis of your case. Remember, when you need a divorce lawyer or representation for any family law matter you should always choose the most experienced attorney you can afford. Choose an attorney whose values you can depend on! When you, your friends, family or loves one need help with family law, call Sam Jubran right away at (904) 360-6100. Help is on the way!!!