WELLS FARGO Advisors

Your financial organizer for divorce

If divorce is in your future, you have a lot on your mind. Besides going through a rollercoaster of emotions, you may have family members, your household(s), and a business to think about. During this transitional part of your life, it's important to remember each divorce is different — there are no pat answers on how to get through the process.

But one thing is certain — divorce is hard enough without having to worry about how it will affect the financial security you've worked so hard to build. That's why we've created the following worksheet to help you organize your financial information. Once you've completed this worksheet, you'll have an overview document to share with your financial, tax, and legal professionals to help ensure your rights and investments are protected.

Income

	You	Your spouse	Total
Sources (Wages, business income, investments, retirement accounts, rentals, royalties, trust accounts, Social Security, etc.)			$
			$
			$
			$
			$ 0.00

Expenses

	You	Your spouse	Total
Housing and utilities			$
Food and clothing			$
Medical care			$
Insurance			$
Charities			$
Entertainment			$
Child care/tuition			$
Debt payments			$
Transportation			$
Taxes			$
Other			$

Assets

	Value	Owner	Marital/separate
Personal bank accounts	$		
Business bank accounts	$		
CDs	$		
Safe deposit box	$		
Other	$		

Investments

	Value	Owner	Marital/separate
Brokerage accounts	$		
Life insurance (cash value)	$		
Annuity contract	$		
Business interests	$		
Other	$		

Retirement funds/employee benefits

Defined contribution (401(k), etc.)	$		
Defined benefit/pension	$		
IRAs	$		
Restricted stock grants	$		
Stock options	$		
Health savings account	$		
Other	$		

Real estate

Primary home	$		
Second home	$		
Land	$		
Rental real estate	$		
Other	$		

Household/personal items

	Value	Owner	Marital/separate
Furniture	$		
Clothing	$		
Crystal	$		
Silver	$		
Jewelry	$		
Books	$		
China	$		
Art	$		
Collectibles	$		
Electronics	$		
Tools, guns, hardware	$		
Other	$		

Vehicles

Cars	$		
Boat	$		
RV	$		
Trailer	$		
Motorcycle	$		
Other	$		

Miscellaneous

Memberships	$		
Tax refunds	$		
Copyrights/trademarks	$		
Time-shares	$		
Other	$		

Debts

	You	Your spouse	Payment schedule
Mortgage(s)	$	$	
Car loan(s)	$	$	
Credit card(s)	$	$	
Personal loan(s)	$	$	
Student loan(s)	$	$	
Other	$	$	

Talk to Wells Fargo Advisors

We welcome the opportunity to work with you to help you achieve your planning goals. Contact us for more information and to learn about how we can assist you.

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