

SANTUCCI

FAMILY LAW



NEW CLIENT CHECKLIST

Although this list is not all-inclusive, you may wish to consider some divorce preparation before meeting with us for a consultation, such as:

_____ If later access may be jeopardized, gather and organize important and currently accessible documents such as bank and brokerage statements, property titles, insurance policies, retirement plans, mortgage statements, and trusts.

_____ Obtain tax returns (ideally the last three years) and keep them in a safe place. Scan them to yourself to keep a digital copy.

_____ Obtain your credit report.

_____ Start a list of assets and liabilities.

_____ Make a list of financial contributions you made during the marriage for which you intend to seek reimbursement; start gathering documents which reflect those contributions.

_____ Estimate the amount of money you may need to meet living expenses and set aside sufficient funds based on that estimate.

_____ Meet with an estate-planning attorney to obtain advice regarding revisions of your will and changes to your medical directive and powers of attorney. You may wish to update beneficiary designations or consider making changes to your trusts.

_____ Obtain a health insurance quote if your current health insurance is under your spouse's plan.

_____ Obtain a full health physical, schedule the tests you may have been putting off and get any dental work done you might need.

_____ Consider changing passwords on computers, Internet accounts, cellphones, personal credit card and bank accounts, if appropriate. Store new passwords in a safe but accessible place, such as a password protected document or note on your cellphone.

_____ Consider copying hard drives and removable storage drives.

_____ Open a new email account dedicated exclusively to divorce document storage and communication.

___Obtain a functional scanner and investigate apps for your phone that allow you to review and transmit documents easily. We can recommend some to you.

___Be on your best behavior and conduct yourself with decorum, no matter your privately felt emotions or fears. Know that what you write, email or text can be used against you in the proceeding.

___Keep your Facebook, Twitter and Instagram posts positive, but innocuous.

___Consider what you want from your post-divorce life and set goals. Be realistic.

___If you have not already, please consider counseling. For anyone going through a divorce, it is encouraged. Our office will be happy to provide you with the names of several local therapists that we recommended.