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Separation Document Checklist

The financial and personal records to gather — free, from Ardent Workshop.

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YOUR RECORDS, IN ONE PRIVATE FILE YOU OWN

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The records to gather for a separation

Before you can organize your separation, you have to find everything — and access to shared accounts can change fast. This printable checklist is the finding part: the financial and personal records to gather into one place. Tick each as you get your own copy, and gather the statements early, while it's still easy.

THE ONE RULE — RECORD FACTS & LOCATIONS, NOT CREDENTIALS

For each item, the goal is your own copy and one line on where it's kept — never a password, a PIN, or a full account number. And keep whatever you gather in a place only you control, not a shared computer or cloud the other party can open.

Identity & the marriage

- Marriage certificate
- Prenuptial or postnuptial agreement, if any
- Recent tax returns — the last three years
- Each party's Social Security card and ID (record the location only)

Income

- Recent pay stubs — for both parties
- W-2s and 1099s — the last two years
- Proof of any other income (rental, self-employment, benefits)
- Any support already being paid or received

Bank & investment accounts

- Checking and savings statements — 12 months, joint and separate
- Retirement and pension statements (401(k), IRA, pension)
- Brokerage and investment account statements
- A list of every account and who it's titled to

Debts

- Mortgage statement and the deed
- Home-equity loan or line-of-credit statements
- Auto loan statements
- Credit card statements — every card, joint and separate
- Student and personal loan statements

Property & other assets

- Vehicle titles
- A recent value estimate for the home and any other property
- Business documents, if you own or co-own one
- A list of valuable personal property worth noting

Insurance

- Health, life, home, and auto policies
- Beneficiary designations

Children (locations only)

- Birth certificates and insurance cards
- School and doctor names and contacts
- The current parenting schedule — write it down

Your team

- Attorney
- Mediator, if you're using one
- Accountant or financial advisor
- A trusted support person

THIS IS THE FINDING LIST — THE ORGANIZER IS WHERE IT ALL GOES

This checklist tells you what to locate. The Divorce / Separation Records Organizer is where it all gets inventoried and totaled — a 10-tab workbook (Excel & Google Sheets) plus four guides: asset and debt inventories that total themselves, a monthly budget, a shared-bill balance, a documents index, contacts, and a co-parenting reference. [Get it at ardentworkshop.com](https://ardentworkshop.com) ›

A records-gathering checklist, not legal, financial, or tax advice, and not a court form. It does not decide what is separate or marital property or how anything is divided — rely on your own attorney, mediator, or financial professional. Record where things live, never passwords or full account numbers. © Ardent Workshop LLC. Free to use; please don't resell or redistribute.