



Property settlement financial checklist

In a family law property settlement, 'property' includes a wide range of assets, from your home, savings and superannuation through to cars, business interests and even inheritances. Importantly, it also includes any liabilities and debts.

We've prepared this checklist of the documents you will need to compile to help progress your settlement. You don't need to collate them for your first meeting with your family lawyer, but rather this checklist provides an overview of the information you are required to disclose during your negotiation.

- Statements for all bank accounts, details of account numbers for the previous 12 months
- Details and records of any investments including stocks and shares
- Details of credit union/building society or other like deposit passbooks and statements for the previous 12 months
- Details and records of any investments including stocks and shares
- Income tax returns and assessments for the previous 3 financial years
- Details of Centerlink payments received
- Details/records of long service leave accrued
- Details/records of overtime worked for the previous 12 months
- Statement showing the current balance of your superannuation entitlements, including a completed 'Superannuation: Information Required for Family Law matters' form (or a form which substantially complies with that form)
- Valuation or appraisals of real estate owned by you
- Valuation or appraisals of assets owned by you, including cars
- Records/details of any life insurance or disability insurance or other policies
- The Trust Deed, financials and tax returns of any trust in which you or your spouse have any interest for the previous financial years
- The Constitution or Memorandum of Articles of Association of any company