



GET THE MOST OUT OF YOUR FAMILY LAW CONSULTATION

The information provided here is intended to be a general discussion and is not intended to be taken as legal advice.

Deciding to hire an attorney to handle your family law matter can be an intimidating decision. We get asked all the time if investing in an attorney will ultimately save money in the long run.

Is it worth it?

The only way to answer this question is by having a productive consultation with an attorney you trust. The tips below will help you get the most out of your initial consultation while also providing an organized system to keep you on track, focused, and in control of your legal matter.

	Create a new email account just for your legal matter. This will help you organize communication regarding your case organized and make it easier to focus on the task at hand when you are logged in.
	Create folders in your new email account where requested documents can be neatly organized.
	Get a clean notebook with a calendar where notes, deadlines, to-do lists, contacts, etc. can be stored and easily found when you need them. Start with writing down some of the points below.
	Create a list of the assets, debts, and financial obligations belonging to you, your spouse, and the marital community.
	Draft a “perfect scenario” goal list for your case.
	Start a page in your notebook where you can write questions for your attorney or paralegal as they pop up.
	Get an accordion folder to organize and store hard copies of legal and financial documents (see below).
	Schedule childcare for your appointment time if need be. Children are typically not permitted to accompany their parents at legal appointments.
	Be mindful of your words. Don’t let the high emotion of your situation lead you to lash out on social media, text messages, voicemails, etc.
	Make a budget or plan for covering attorney costs and fees. It will be much easier to have a real conversation with your attorney about representation if you know what you can afford.
	Consider working with a therapist or other emotional support person during this process and don’t hesitate to reach out to friends and family know when you need help.
	Make copies of your important financial documents (see list on page 2).
	Make copies of important legal documents (see list on page 2).

Documents You May Need:

The information provided here is intended to be a general discussion and is not intended to be taken as legal advice.

✓ Financial Documents

Last five years of tax returns (joint or for each spouse if filed separately)
24 months of paystubs for each spouse
Current mortgage and/or equity credit line payoff for all properties
Estimated market value for all properties
Kelly Blue Book or NADA value for all vehicles and similar value estimate on boats, RVs, etc.
36 months of statements for all financial accounts (joint, individual and shared with a child): savings, checking, investment, loans, credit cards, car/boat loans, student loans, etc.
Current retirement account balance statements and estimates for each spouse
A social security statement (available here)
Statements and policy details for all insurance premiums: life, auto, home, medical, dental, high value items, etc.
Last 12 months of utility statements: electric, gas, water, sewer, cable/internet, cell phone, alarm system, pest control, landscaping, HOA dues, Good to Go account, etc.
Statements for all reoccurring expenses for children: tuition, therapy, medication, sports, memberships, activities, etc.

✓ Small Business Documents

Last five years of tax returns
24 months of paystubs and distributions to each partner/member/shareholder
36 months of balance sheets
36 months of profit and loss statements
Operating agreements, partnership agreements, shareholder agreements
36 months of statements from all accounts: savings, checking, investment, loans, credit cards, equipment loans, leases, mortgage statements, etc.
List of asset and debts belonging to the business
Inventory list and current value
Current value for all equipment, buildings, bids, etc.

✓ Legal Documents

Birth Certificates and filed Paternity Acknowledgments if applicable
Drivers License numbers for each spouse
Children's social security numbers
Appraisals for property, jewelry, or other high value items
Contracts such as: prenuptial agreements, settlements/ settlement offers, leases, HOA CC&Rs, family loans, subscription services, memberships, etc.
Records for the children: school, medical, vaccines, therapy
Court documents from prior cases