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Documents Needed for Intake Appointment

- ⇒ Copies of Federal tax returns filed for last two (2) tax years including W-2's and 1099's
- ⇒ All pay stubs received in the **last 6 months** for every job you (spouse) may have been employed at (even if filing individually); if you do not retain copies, please obtain an **itemized** printout or confirmation of gross income/deductions from your payroll provider
- ⇒ If you are self-employed or own your own business, please provide profit and loss statements for this year and the proceeding two years related to the business.
- ⇒ Monetary amount you received in Social Security, rental income, retirement income, child support or from any other source for this year, to date and the two (2) prior years
- ⇒ A copy of your most recent bill from each source; do not include bills you pay off every month, such as utility or phone bills unless you are behind on the bill
- ⇒ Any court, lawsuit, or garnishment papers received in the last 2 years
- ⇒ **Six preceding months** of checking and savings account statements; if you have closed, redeemed, or removed your name from any accounts in the last 12 months, obtain the date and amount at time it was closed or redeemed
- ⇒ Previous addresses you have lived at for the last 36 months from today (please determine in advance **the month and year** you moved to or from each address)
- ⇒ If you own Real Estate, you must obtain a comparative market analysis on the property or recent appraisal. You may obtain a market analysis through any Realtor in your area
- ⇒ **TIMESHARE VALUATION:** Print list of all timeshares for sale for your property for your week: <https://www.sellmytimesharenow.com/timeshares-for-sale/>
- ⇒ Amount currently deposited in any retirement, stocks, bonds, or other financial accounts; if you have closed, redeemed, or removed your name from any accounts in the last 12 months, obtain the date and amount at time it was closed or redeemed

- For any life insurance policies you may own, proof of beneficiary information and current cash value for each, if any
- Name **and address** of all persons you are obligated to pay child support or alimony to as well the amount of any arrearage you may owe
- All loan documents **including a list of all collateral** pledged for the loan; for any debts secured by a car or home, we will need the current payoff information for the loan
- If you have paid back any debts or loans to a family member or relative in the last 12 months, provide the name of the person(s) and date / amount of the repayment(s)
- If you have transferred any property (real estate, vehicles, furniture, etc.) in the last two years, provide details as to what was sold, to whom, when and how much was received
- If you paid tithes, offerings or contributed to any churches or charities in the last 24 months, list the name, address, and best estimates for the amount you have paid during that time frame
- Copies of all titles to vehicles, boats, mobile homes or trailers as well as any recorded mortgages on real estate in your possession
- If you have divorced in the last 6 years, a copy of any marital settlement agreement or divorce decree showing the apportionment of any assets or liabilities

If you have any questions, please feel free to call the office 856-282-5505 or send an email pikunislaw@gmail.com

IF YOU ARE UNABLE TO LOCATE OR PROVIDE YOUR TAX RETURNS, YOU MAY ORDER A TAX TRANSCRIPT ONLINE FROM THE IRS.

- Go to www.irs.gov
- Right hand column “Get Your tax record”
- Choose “Get Transcript Online” button
- **Enter Name, DOM, SSN, ADDRESS and answer some basic security questions**
- Once you get to the “Get Transcript” page, choose the Year under “Return Transcript”

ALL DOCUMENTS MUST BE RECEIVED FOR YOUR CASE TO BE PREPARED AND FILED