

## **MOTION TO PRODUCE WORKSHEET**

- TAX RETURNS: Year \_\_\_\_\_, Year \_\_\_\_\_, Year \_\_\_\_\_.
- COPIES OF INCOME RECORDS FOR THE PRECEDING YEAR (in order by month)
- EMPLOYMENT INFORMATION
  - wages, salaries,
  - bonuses,
  - stock options
  - commissions
  - raises
  - pension information
  - retirement plans
  - other
- LOANS (list each individually)
  - secured & by what
  - unsecured
  - to whom
- SAVINGS ACCOUNTS (all)
  - copy of Statements – last 3 months
- CHECKING ACCOUNTS
  - copy of register
  - copy of Statements – last 3 months
- REAL ESTATE
  - owned by you in any capacity (jointly, solely)
  - contributions or payments made to such for the last 2 years
  - leases
  - offers to purchase, sales contracts (buying or selling)
- BUSINESS RECORDS – IF ANY (in which you own an interest)
  - NONE
  - sole proprietorship
  - joint ventures
  - partnerships
  - other
- OTHER INTERESTS (monetary)
  - pension
  - retirement
  - profit sharing plans
  - include copy of plan

- INSURANCE
  - live insurance
    - whole life & cash value
    - term life
  - beneficiaries
  
- CREDIT CARDS
  - each card held by you (solely or jointly)
    - statements for the last 6 months
    - payments made for the last 6 months
  
- VEHICLES
  - registration to all motor vehicles you use
  - copy of titles
  
- GIFTS (including personal, firm, trust or other entity)
  - gifts for the last 2 years greater than \$200.00
    - to whom
    - what was it
    - approx. value
  
- OTHER FUNDS
  - any and all other accounts
    - deposits
    - withdrawals
    - credits
  
- ALL OTHER TRANSACTIONS
  - Stocks
  - bonds
  - property
  - all other
  
- ALL OTHER DOCUMENTARY EVIDENCE