

Documents You May Need to Provide

1. Your three most recent Individual Tax Returns and Notices of Assessments.
2. Any documentation which evidences Capital Gains Tax and/or income tax losses carried forward.
3. Any superannuation documents for each superannuation interest you hold including:
 - (a) The most recent member benefit statement received from the fund;
 - (b) For a self-managed superannuation fund, the trust deed and the last three financial statements; and
 - (c) Binding or non-binding death benefit directions or reversionary pension directions.
4. For a corporation (business), trust or partnership in which you hold an interest:
 - (a) Financial statements for each (including balance sheets, profit and loss accounts, depreciation schedules and taxation returns) for the last three years;
 - (b) Any business activity statement for the last 12 months;
 - (c) Business Agreements, including shareholders agreements and buy/sell agreements;
 - (d) Documentary evidence of equitable charges whether provided personally or in capacity as Director of a company/Trustee of a Trust;
 - (e) Guarantee documents for all guarantees whether provided personally or in capacity as Director of a company/Trustee of a Trust.
5. For any corporation, the corporation's memorandum and articles of association/company constitution.
6. For any trust, the trust deed (including any deeds or amendment or minutes amending the terms of the trust).
7. For any partnership, the partnership agreement.
8. All documents containing evidence about:
 - (a) The financial contributions made at the commencement of cohabitation;
 - (b) Any inheritances, gifts or compensation payments received during cohabitation;

- (c) Any purchase or disposal of property in the 12 months prior to and since separation;
 - (d) Any increase or reduction of liabilities since separation;
 - (e) The value of any superannuation interest of a party, including the basis on which the value has been calculated and any documents used to calculate the value.
9. All complete bank account statements or passbooks for all bank/credit union/building society accounts, including the mortgage account and credit cards held solely in your name or held jointly with another party since separation.
 10. Details and records of any investments including stocks and shares.
 11. Social security pension or payment details.
 12. Details/records of overtime worked in the previous 12 months.
 13. Details/records of long service leave accrued.
 14. Appraisal/valuation of real estate.
 15. Appraisal/valuation of chattels including car(s).
 16. Records/details of any life assurance or disability insurance.
 17. Nominations of beneficiaries on life insurance policies (including recent statements evidencing nomination of a beneficiary).
 18. Leases – residential and commercial.
 19. All documents relating to the purchase of any property, residential or commercial, including contracts, settlement statements, solicitor's accounts, stamp duty payments etc.
 20. Existing Will, Enduring Power of Attorney/Power of Attorney and Advance Health Directive.
 21. Marriage Certificate.
 22. Medical or psychiatric reports.
 23. Medical certificates.
 24. Details/records of any of the above re children.
 25. School reports.