



Property Settlement Matters
Documents required at initial meeting.

Please provide the following documents when you attend the first meeting with us.

1. Your last 3 months pay slips;
2. Your 3 most recent taxation returns and assessments;
3. Current superannuation statements for each superannuation interest you holds;
4. Bank statements for any bank account you have an interest, including but not limited to savings accounts, credit cards, mortgages for the previous 3 months;
5. Market appraisals of any item of property in which you have an interest, including real property;
6. For a corporation, business, trust or partnership in which you have an interest:
 - a. Financial statements for each, including balance sheets, profit and loss accounts, depreciation schedules and taxation returns, for the three last financial years;
 - b. Any business activity statements for the previous 12 months;
 - c. For any corporation, its most recent annual return, listing directors and shareholders; and the corporation's constitution;
 - d. For any trust, the trust deed, and variations; and
 - e. For any partnership, the partnership agreement and any variations;
7. All documents containing evidence about:
 - a. Any initial contributions;
 - b. Any purchase or disposal of property in the 12 months prior to and since separation;
 - c. Any increase or reduction of liabilities since separation;
 - d. Any gifts, inheritances or windfalls received by your client during the relationship or post separation;
 - e. Any rent paid by a party residing in any real property; and
 - f. List of your dependants, children, step children, parents, siblings etc.
8. Any other relevant documents.

P: 0417 677 611
E: office@cateandco.com.au

A: PO Box 107, Maryborough, QLD 4650
W: cateandco.com.au