

INITIAL DOCUMENT REQUEST

1. The date of the marriage. (Is there a separate property issue?)
2. The date of separation.
3. Valuation date (if known or otherwise agreed to).
4. Date of trial.
5. Complete copies of the last three (3) years personal income tax returns of the parties as filed.
6. Complete copies of the last five (5) years of federal and Oklahoma tax returns to include all schedules and exhibits of any entities operating the businesses.
7. Complete copies of financial statements of any entities operating the businesses as of December 31, 2014, December 31, 2015, date of separation or close thereto, and the most recent date available.
8. Complete copies of the purchase agreement if the parties purchased the businesses (rather than developing them from their initial existence).
9. Complete copies of any business agreements that might provide information concerning any restrictions to the value of the businesses.
10. Complete copies of any valuations if the business has ever been valued.
11. A copy of the aged accounts receivable of the businesses as of the date of separation or valuation. Provide the documentation concerning any portion of the accounts receivable that may be uncollectible.
12. A listing of the accounts payable of the businesses as of the date of separation or valuation.
13. Any and all information either party believes will be helpful in determining the value of the businesses.

Note: The receipt of these documents may cause additional documents to be requested.