

## DISCLOSURE DOCUMENTS

1. Your three most recent personal taxation returns and assessments.
2. 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.
3. 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; and
  - b. Any business activity statement for the last 12 months.
4. For any corporation, the corporation's memorandum and articles of association/company constitution.
5. For any trust, the trust deed (including any deeds or amendment or minutes amending the terms of the trust).
6. For any partnership, the partnership agreement.
7. 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.
8. Such documents shall include but not be limited to:
  - a. All complete bank account statements for all joint accounts, including the mortgage account, since separation;

- b. List of all bank accounts, details of account numbers, passbook and bank statements for the previous 12 months;
  - c. Details of credit union/building society or other like deposit passbooks and statements for the previous 12 months;
  - d. Details and records of any investments including stocks and shares;
  - e. Social security pension or payment details;
  - f. Details/records of long service leave accrued;
  - g. Appraisal/valuation of real estate;
  - h. Appraisal/valuation of chattels including car(s); and
  - i. Records/details of any life assurance or disability insurance.
9. Existing Will, Enduring Power of Attorney/Power of Attorney and Advance Health Directive.
10. Business agreements including shareholders agreements and buy/sell agreements.
11. Nominations of beneficiaries on life insurance policies (including recent statements evidencing nomination of a beneficiary).



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