



Getting started  
efficiently and  
cost-effectively







**We provide our clients  
with expert advice,  
options, pathways  
and solutions in family  
law matters.**

O'REILLY SHAW LAWYERS



**“Going through a  
separation is not pleasant.**

O'Reilly Shaw Family Law provided an efficient and courteous service. Louise walked me through the process and made it as stress-free as possible. Forms were simple to complete, communication was excellent and the timing exceeded my expectations. Costs were explained clearly and the firm was honest in their charging. Without question I would recommend O'Reilly Shaw Family Law.

Thank you for turning something I was fearing into a much easier and more positive process.”

# Getting started.

If you have separated (or you are thinking about separating), and plan on getting at least some basic advice from a lawyer about dividing your assets, there are ways you can keep your legal fees down and fast-track getting started.



## Assets

Write a list of all of the assets, liabilities, superannuation, business interests and trusts that you and your partner have, whether you own them together, in separate names or in someone else's name for you.



## Values

Provide your best estimated value for each item in your list.



## Timeline

Write down a rough chronological order (i.e. a timeline) of the relationship and the family's finances. Include crucial dates and events, such as:

- when you were married/separated
- children's dates of birth
- periods of parental leave
- education/qualifications
- what each of you owned when you began living together
- employment/income histories (what each of you earn/ed)
- details of any inheritances, significant gifts, wins, and lump sum payments received



## Future

Provide a brief summary of your future plans, such as what you intend to do for employment/income, if you plan to re-train, the status of your health, expected arrangements for the children, the major expenses of the children and who is expected to pay them.



## Budget

Prepare a list of your monthly living expenses and those of the children (i.e. a budget).



# Checklist of documentation to gather:



Your statements in relation to all bank accounts, (including loan accounts and credit cards) which you have operated, or in which you have or have had an interest, for the previous 12 months.



Details of your current income, including your employment contract and your three most recent pay slips.



Any other documentation relevant to determining your income, expenses, assets, liabilities and financial resources.



Your three most recent taxation returns and assessments.



For any corporation (business), trust or partnership in which you have an interest (including overseas):

- a) financial statements for each (including balance sheets, profit and loss accounts, depreciation schedules and taxation returns) for the last three financial years; and
- b) any Business Activity Statements for the last 12 months.



For any corporation, its most recent annual return, listing directors and shareholders and the corporation's constitution.



For any trust in which you have a beneficial interest or of which you are the trustee or appointor, the trust deed and the taxation returns for that entity for the last three financial years.



For any partnership, the partnership agreement, including amendments, and unless the value is agreed, a market appraisal of any item of property in which a party has an interest.



Details and values of interests in any superannuation funds.



Appraisal/valuations of chattels including motor vehicles, boats, jewellery, antiques and furniture that you own or hold in your possession or have disposed of since separation.



Details/records of any investments including stocks and shares.



Social security pension or payment details.



Details/records of long service leave accrued.



Details/records of overtime worked in the previous 12 months.





## Free Consultation.

Call us now on 07 3236 4504 or email [mail@osfamlaw.com.au](mailto:mail@osfamlaw.com.au) to book in your free 15 minute phone consultation.

We look forward to speaking with you soon.



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