Dear Client:

Effective January 1, 2021, the Texas Rules of Civil Procedure require that, **within 30 days of the filing of an answer in your pending case (regardless of who files the answer)**, we provide certain information. For ease in use, our office is providing you with an Excel spreadsheet to help you gather the required information.

This mandate requires your immediate cooperation and diligence in gathering the necessary information:

- Names, addresses and phone numbers of witnesses. This list will include people who have information that would support our position in your case. This will be family members, neighbors, schoolteachers, doctors, counselors, employers, and financial advisors. This is not an all-inclusive list. If there are others that have information that will be helpful, please include them as well. The more information you provide, the more helpful it is in prosecuting the case.

- Please provide the following documents – if you do not have access to the accounts and your name is on the account, please make all efforts to obtain the documents:

    - The three most recent bank statements including any accounts on deposit with any financial institution, savings and loans, credit unions and brokerage accounts.
    - Three most recent statements for all pension, retirement, 401(k), SEP/IRA, or other employee benefit accounts.
    - Documents, including declaration/benefits page and premium notices for all life, casualty, auto insurance, umbrella, liability, and health insurance.
    - Documents related to real estate that you or your spouse owns including property owned prior to marriage and property that was inherited. This list includes closing documents, deeds, mortgage statements. You may need to reach out to the title company for this information.

- If you have children from the marriage, please include the following documents:

    - All policies, statements, and the summary of benefits for medical and health insurance available for the children or the other spouse.
    - Two years of tax returns including IRS Forms W-2, 1099's and Schedule K-1's.
    - Two most recent pay stubs

You may provide this information several ways:

- Provide a flash drive with the information, spreadsheet, and documents
- Upload the documents to our case management program
- Deliver hard copies to my office.

Please do not email the documents to our office in a piecemeal fashion as that increases the likelihood that they could be overlooked. We are always here to assist and answer any questions. Please call us at (940) 767-8888.