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 of use, our office is providing you with the attached list to help you gather the required information. Please return this information to us within ***15 days of the date you receive this letter***.

This requires your immediate cooperation and diligence in gathering the necessary information, as follows:

- Names, addresses and phone numbers of witnesses. This list will include people who have information that would support your 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 presenting your case.

- A general list of all electronically stored information pertinent to the case (such as bank statements, retirement account statements, mortgage statements, emails, and the like).

- Please provide the following documents. If you do not have access to the accounts but your name is on the account, please make all efforts to obtain the documents directly from the provider or financial institution:

    - The most recent bank statement for any accounts on deposit with any financial institution, including banks, credit unions, savings and loans, and brokerage firms.
    - The most recent statement for all pension, retirement, 401(k), SEP/IRA, profit-sharing, or other employee benefit accounts.
    - Documents, including declaration/benefits page and premium notices, for all life, casualty, auto, homeowner's, renter's, umbrella, liability, health, dental, and vision insurance policies.
    - Documents related to real estate that you or your spouse own including property owned prior to marriage and property that was inherited. This list includes closing documents, deeds, and mortgage statements. You may need to reach out to the title company for this information.
    - Two years of tax returns including W-2s, 1099s, and Schedule K-1s. If you have not filed taxes for the past two years, then all W-2s, 1099s, and Schedule K-1s for such years.
    - Your two most recent paystubs.
    - If child and/or spousal support is an issue, then provide all policies, statements, and a summary of benefits for any medical or health insurance coverage that is or would be available for the child and/or the other party.

You may provide this information several ways:

- Provide our office with a flash drive with the information, spreadsheet, and documents
- Email the documents to our office (or upload to a file sharing service like Dropbox and email our office the link to the documents). Email them to: alanna@robertsonneallaw.com, assistant@robertsonneallaw.com, and robby@robertsonneallaw.com
- Deliver hard copies to our office.