

Mediation Checklist



The following is a brief overview of the issues that are typically addressed in family law mediation, and the type of information that may be helpful to your attorney and mediator in resolving your issues. This list is not meant to be comprehensive, but a starting point from which to collect information. If you have any question about whether your mediator and attorney may find something useful, generally erring on the side of providing too much information is preferable than not enough.

FINANCIAL

- Current Financial Affidavits
- Current Budget Worksheet
- Current Pay Stubs (Including W-2 and 1099 statements)
- Copies of Current Benefit Statements
- Current Retirement Statements (Pension, 401K, 403(b), IRA)
- Bank Statements (Last 6 months)
- Current Asset Statements (Stocks, Savings, Money Markets)
- Current Children's Accounts (CD's, 529 plans, College savings)
- Property Appraisals on All Real Property Owned
- Statement of all Automobiles (Make, Model, Year, Mileage, Kelly Blue Book value)
- Any Benefit Statements
- Information on Any Pending Civil Action (Either spouse named as Plaintiff)
- Loan Balance Statements
- Personal Property (Estimate value)
- Appraisal of Any Business Owned

LIABILITIES

- Current Mortgage Balance Statements
- Current Balance Statements for all Motor Vehicles
- Current Balance Statements for Student Loans
- Current Balance Statements for all other Private Loans
- Credit Card Statements (Last 6 months)
- Information on Any Pending Civil Action (Either spouse named as Defendant)

© 2017 Rebecca W. Geyer & Associates, PC. All rights reserved. Rebecca W. Geyer & Associates, PC claims all copyrights in the content of this website under all United States and applicable foreign laws and treaties. Some information on this website may be copyrighted by others and may not be copied without the permission of the copyright owner. Reproduction or redistribution of the content herein is prohibited without prior written consent.

TAXES

- Copies of State and Federal returns for the last three years and all W-2 and 1099 statements
- Copies of corporate returns for the past three years

INSURANCE

- Insurance Statements and Policies (Health, Auto, Life, Disability)

CHILDREN

- Name and birthdate of all children involved
- Child Care Receipts
- Receipts for Medical/Dental/Vision Expenses
- Documented Time Sharing Schedule

LEGAL

- Marriage Certificate
- Current Court Orders
- Current Court Filings
- Protective Orders
- Any Trust Documents
- Any Premarital and or Marital Agreements
- Any Wills executed during the marriage

MISCELLANEOUS

- Proposed Property Division
 - Real Property
 - Property Appraisal
 - Property Financing
 - Personal Property
 - Value of Assets and Liabilities
 - Household Furnishings
 - Motor Vehicles
- Pension Plans
- Investments

- Retirement
- Educational Expenses
- Inheritance or Gifts
- Business
- Proposed Parenting Plan
 - Time Sharing Plan
 - Weekly Schedule
 - Vacation Schedule
 - Holiday Schedule
 - Childcare
 - Extracurricular Activities (Including division of cost)
 - Communication
 - Between Parents
 - Between Parent and Child
 - Child Support and Expenses
 - Number of Yearly Overnights
 - Health Insurance
 - Educational Expenses
 - Tax Deductions
 - Life Insurance Beneficiaries
 - School/College Expenses
 - Extra Expenses: Activities, Birthdays. Non-Essential Items
- Mediation Statement