

MEDIATION HOMEWORK
[FOR EITHER SPOUSE OR BOTH]

Please discuss who will prepare these answers and gather the necessary documents, and then bring them to the next mediation session. If convenient, have copies made for each of you and for the mediator. If you need more room, attach extra sheets.

1. Tax Documents (provide copies – they will be returned following the mediation)
 - a. Federal tax returns filed by you jointly for the last three (3) years
 - b. State tax returns filed by you jointly for the last three (3) years
2. The Marriage
 - a. Date and place of marriage
 - b. If separated, date and place you last lived together
 - c. Any prior separations and, if so, when and for how long
3. Children of this marriage
 - a. Names and dates of birth
 - b. Currently living with whom
 - c. Present arrangements for the children – *e.g.*, are they in school, is any third person involved in their care, etc.
 - d. Present arrangements for sharing time with the children, if separated
 - e. Any current medical problems of the children or any anticipated medical or dental expenses
 - f. Any of the children receiving psychological counseling, have special educational needs or having problems in school, etc.
 - g. Any trust funds or other property owned by the children or held for them and whether you expect them to receive property in the future, by gift or inheritance
4. Life insurance on any family member
 - a. Company
 - b. Owner of the policy
 - c. Face value amount
 - d. Insured party
 - e. Beneficiary
 - f. Who pays the premium
 - g. Type, whether ordinary or whole life, term, annuity or other
5. Family health insurance plan
 - a. Company
 - b. Owner of the policy
 - c. Term of coverage of the non-employee spouse after divorce

- d. Term of coverage of the children after divorce
 - e. Availability of a more economical form of health insurance for the two of you
6. Each spouse's pension, annuity, savings, profit-sharing, deferred income or other retirement plan
- a. Company
 - b. Owner of the policy
 - c. Present value or death benefit, if any
 - d. Options available

Note: It is important to provide any documentation you may have, from your employer or otherwise, concerning any interest in this type of plan, annuity or pension, as well as the options available. If convenient, bring a copy for both your spouse and for the mediator.

7. Present household expenses
- a. Who is now paying which bills
 - b. How much is each party contributing
8. Marital home
- a. In whose name stands the title
 - b. Approximate fair market value
 - c. Balance of unpaid mortgage
 - d. How much was paid for the house and in what year
 - e. Who contributed what amounts to the down payment

Note: If there is other real estate that has been acquired during the marriage, answer the questions set forth above.

9. Other assets – indicating with H for husband, W for wife, J for joint ownership or other – who owns which asset(s)
- a. Bank accounts
 - b. Money market funds
 - c. Stocks and bonds
 - d. Business interests
 - e. Personal effects of value, such as cars, furniture, appliances, stereo, books, silver and jewelry.

Note: If the division of this property has already been agreed upon, do not answer. If not, list only the most important items here.

- f. Other (specify)
10. Possible legacies or inheritances for either spouse

11. Liabilities
 - a. Outstanding debts (other than mortgages)
 - b. Other
12. Outstanding credit cards (indicate with H or W any you wish to keep)

PROPOSALS

Describe below any agreements the two of you have reached in terms of your divorce. List also any proposals either of you has suggested, or you would like to offer now for consideration, in order to resolve any remaining issues.

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