

Divorce Mediation Checklist



A requirement for divorce mediation is full and complete release of all information from each spouse for it to be successful. In complicated marital estates with a lot of debts and assets, this information can occasionally be extensive.

A lot of mediation clients say that the preliminary document-gathering stage is the least pleasant part of the process. They also say that after they collected and provided all the documentation for their attorney-mediator, the sessions themselves ran a lot more seamless than they ever could have dreamed of.

As a result, putting in the effort, time and preparation beforehand in gathering all of the necessary information. Doing this will pay huge returns later for each of you when later examining your estate with your mediator and together making those critically important decisions for your corresponding futures.

A comprehensive divorce mediator will typically ask you to present the following information and documents ahead of your mediation sessions:

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Here is a checklist of documentation, and over a dozen key matters to be talked about with your spouse to assist you in resolving your divorce or separation.

Assets

- Biographical details for each spouse (contact info, names, addresses, the marriage date, annual gross income & employment for both of you).
- Present balance statements for each bond and stock and investment statements.
- Present balance statements for each bank account (savings, checking, money markets, CD's).
- Statements of unpaid loans, or verbal agreements to repay a loan whereupon one or both spouses are listed as creditor(s).
- Present balance statements for each child's accounts like CD's, other custodial college savings plans or 529 plans.
- Model, make, and year of any vehicles owned and a statement of the confidential party value for them as they are listed on [Kelly Blue Book](#).
- Details of any unsettled civil lawsuit claims whereupon either or both spouses are listed as plaintiff(s).
- Present statements of any retirement accounts owned by each spouse like 401(K)s, company pension plans, 457's Thrift Savings Plans, 403(b)s, TIAA-CREF, Roth and Traditional IRA's. Some plans might need to be assessed by an experienced actuary for their current day market value.
- Statements of any other employment benefits like stock options, incentives, cash balances or golden parachute plan.
- Personal Property—estimated value of the contents of any homes owned, any jewelry, all art, antiques and other objects of significant value. Some items might need to be specially appraised for their value if spouses can't agree on their value.
- Present market value appraisals for any real estate owned, like the primary residence, investment properties, vacation homes, any timeshares, or available land, pending spouses comply that the property if going up for sale.
- The appraisal of any businesses owned for their current estimated market value if designated by the spouses.

Income

- Photocopies of income statements/pay stubs of both spouses for the past 6 months of all 1099 or W-2 employment.

Liabilities

- Present balance statements for any motor vehicle loans.
- Present balance statements for home equity loans, any mortgages, or lines of credit held on all properties owned.
- Statements for any other privately-held loans, either verbal or with a written note, whereupon one or each spouse is the debtor(s).
- Present balance statements for any student loans.
- Details on any pending civil lawsuits whereupon one or both spouses is/are a named defendant(s).
- Present a balance statement for any credit card accounts.

Insurance

- Information page for any life insurance policies held by one or both spouses, and a statement of the cash relinquishment value of any universal or whole life insurance plans.
- Information page for any disability policies held by one or both spouses.

Taxes

- Photocopies of the corporate tax returns for the past 3 years if one or both spouses are business owners
- Photocopies of the federal and state tax returns for the past 3 years and all related 1099 or W-2 statements.

Other Associated Marital Documents

- Photocopy of the marriage certificate.
- Photocopies of any wills carried out during the marriage.

- Photocopies of any pre-marital, and/or marital contracts in effect, like any post or pre-nuptial agreements.
- Photocopies of all trust documents.

If one of you is feeling uncertain about the completeness of the information that the other has presented, you will address these concerns during your sessions. The attorney-mediator will deal with it in a way that is unprejudiced, agreeable, and that will acknowledge each person's perspective.

When collaborating, you both will have gathered together all the information in your estate in just a couple of weeks while feeling as confident as you can that the information you submitted to your mediator is equally fully complete and accurate.

Collecting documents is important, of course, but you'll also want to assess each issue.

[Speak with our Divorce Mediation Attorneys in Scottsdale & Phoenix, AZ](#)

We have a specialized network of Arizona attorneys, tax specialists, financial planners, estate planners, child specialists, real estate property appraisers, adult and child therapists and parenting coordinators who are here to help you when needed. Our [Arizona divorce mediators](#) are here to make your divorce less exhausting and will help keep you in control.

[Moshier Law](#) should be your first choice for when you need the best collaborative [divorce lawyers](#) in [Scottsdale](#), or [Phoenix](#), Arizona. Our experienced [family law attorneys](#) will work with you to get the best possible outcome. You can trust us to represent you fully so you can get on with your life. Call today for an initial consultation!

Divorce and Family Law

When a case demands litigation, you'll have the benefit of 19 years of litigation experience in California and Arizona. But when a case demands collaborative law or mediation, we can meaningfully describe why collaborative law or mediation may or may not be your best option.

Moshier Law services all of Phoenix and Scottsdale, Arizona. Jennifer and her team of professionals seek to resolve Family Law cases efficiently with your goals in mind.