

# DOCUMENTATION

Mediators require full disclosure and verification of all figures that are submitted. It is essential that this be done BEFORE a couple begins discussion on the divisions of assets and liabilities. Please use these sheets or attach additional ones to list any assets you have and your current debts.

Please forward the following items, as applicable:

1. COPIES OF TAX RETURNS, INCLUDING SCHEDULES AND FORMS, FOR PAST YEAR (each of you should also have a copy)
2. MOST RECENT PAY STATEMENT(S) (including the separate cost of medical insurance for the minor children)
3. MOST RECENT BROKERAGE FIRM(S) STATEMENT(S)
4. MOST RECENT BANK ACCOUNT STATEMENT(S), INCLUDING SAVINGS, CHECKING AND CD'S
5. MOST RECENT STATEMENT FROM ALL CREDITORS
6. PAY-OFF AND BLUE BOOK VALUES ON MOTOR VEHICLES AND TRAILERS (blue book figures usually available on the internet)
7. STATEMENT FROM YOUR EMPLOYER(S) REGARDING PENSIONS, PROFIT SHARING, STOCK OPTIONS;
8. FINANCIAL STATEMENT FROM LIMITED PARTNERSHIPS, CLOSELY-HELD BUSINESS OR PROFESSIONAL PRACTICE.
9. COPIES OF REPORTS FROM LIMITED PARTNERSHIPS, CONTRACTS, ETC.
10. ANYTHING ELSE THAT WILL ASSIST IN ASSIGNING VALUE TO YOUR ASSETS AND LIABILITIES.

# REAL ESTATE

Location & Legal description of property: \_\_\_\_\_

Title in name(s) of: \_\_\_\_\_

Date purchased: \_\_\_\_\_ Purchase price: \$ \_\_\_\_\_

Lender: \_\_\_\_\_ Down payment: \$ \_\_\_\_\_

Mortgage: \$ \_\_\_\_\_

Account #: \_\_\_\_\_ Balance owing: \$ \_\_\_\_\_

Length of mortgage: \_\_\_\_\_ Interest rate: \_\_\_\_\_

Location & Legal description of property: \_\_\_\_\_

Title in name(s) of: \_\_\_\_\_

Date purchased: \_\_\_\_\_ Purchase price: \$ \_\_\_\_\_

Lender: \_\_\_\_\_ Down payment: \$ \_\_\_\_\_

Mortgage: \$ \_\_\_\_\_

Account #: \_\_\_\_\_ Balance owing: \$ \_\_\_\_\_

Length of mortgage: \_\_\_\_\_ Interest rate: \_\_\_\_\_

Location & Legal description of property: \_\_\_\_\_

Title in name(s) of: \_\_\_\_\_

Date purchased: \_\_\_\_\_ Purchase price: \$ \_\_\_\_\_

Lender: \_\_\_\_\_ Down payment: \$ \_\_\_\_\_

Mortgage: \$ \_\_\_\_\_

Account #: \_\_\_\_\_ Balance owing: \$ \_\_\_\_\_

Length of mortgage: \_\_\_\_\_ Interest rate: \_\_\_\_\_

# VEHICLES

Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Year: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Amount owed: \_\_\_\_\_  
Lender: \_\_\_\_\_

Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Year: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Amount owed: \_\_\_\_\_  
Lender: \_\_\_\_\_

Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Year: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Amount owed: \_\_\_\_\_  
Lender: \_\_\_\_\_

Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Year: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Amount owed: \_\_\_\_\_  
Lender: \_\_\_\_\_

Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Year: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Amount owed: \_\_\_\_\_  
Lender: \_\_\_\_\_

Make: \_\_\_\_\_  
Model: \_\_\_\_\_  
Year: \_\_\_\_\_  
Current value: \_\_\_\_\_  
Amount owed: \_\_\_\_\_  
Lender: \_\_\_\_\_

# RETIREMENT PLANS

Employment, IRA, SEP-IRA, 401K, KEOGH, ESOP, ETC.

<u>Date of vesting</u>	<u>Type of plan</u>	<u>Investment Contribution</u>	<u>Vested value</u>
<u>Date of vesting</u>	<u>Type of plan</u>	<u>Investment Contribution</u>	<u>Vested value</u>
<u>Date of vesting</u>	<u>Type of plan</u>	<u>Investment Contribution</u>	<u>Vested value</u>
<u>Date of vesting</u>	<u>Type of plan</u>	<u>Investment Contribution</u>	<u>Vested value</u>
<u>Date of vesting</u>	<u>Type of plan</u>	<u>Investment Contribution</u>	<u>Vested value</u>
<u>Date of vesting</u>	<u>Type of plan</u>	<u>Investment Contribution</u>	<u>Vested value</u>