

DOCUMENTS & RESEARCH

It is very helpful to obtain the following documents (or to research these matters by making notes with details of how you determined the required information). Formally, all documents listed on the [Mandatory Disclosure form](#) (Colorado Judicial Form JDF 1125) should be exchanged or shared with the other party, as part of your mediation, and a Certificate will be required of you, affirming you have shared that information. The highlights of required information for our commencing mediation, include:

Income & Support Information:

1. Past 3 year's tax returns
2. Last year's W-2 and/or 1099's
3. Most recent paystub from all employers showing year to date pay
4. If self-employed or if you also own a business, special information including:
 - a. at least several past years tax returns relating to business (business tax returns if corporation or partnership, Schedule C if sole proprietorship);
 - b. records reflecting current gross receipts and ordinary and necessary expenses required to produce that income (as an example, Profit & Loss statements).

Assets & Associated Liens Information:

5. Value of homes, rental or other real estate (consider property tax valuation statements, realtor competitive market evaluations, appraisals)
6. Balance of mortgages (name of companies & payoff balances for each) & home equity lines of credit
7. Description including year, model & mileage of automobiles
8. Balance of auto loans & liens (name of companies & payoff balances for each)
9. Account number, bank name & branch & current balances for all bank, savings & brokerage accounts
10. Bank name & balance of any certificates of deposit
11. Equity name & number of shares held of any stocks
12. Bonds description (including maturity date) of any bonds
13. Details of any and all deferred compensation (restricted share grants, stock options)
14. Description (name of insured, owner of policy, beneficiary, death benefit, present cash value) of any life insurance
15. Description (institution & date with current value) of any Individual Retirement Accounts
16. Description of any 401(k) or similar plan, tax deferred saving plan or other defined

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- contribution retirement account, and the balance of any loan against these
17. Description of any pension type benefits, to include: monthly or yearly benefit earned as of this date (not projected benefit), payable at normal retirement date (earliest date of retirement with full retirement benefits); also need same information as of date of marriage (documentation necessary)
 18. Trusts documents in which either party is named or holds any interest
 19. For businesses, special information will also be required, but bring 3-5 years tax returns relating to business (business tax returns if corporation or partnership, Schedule C if sole proprietorship)
 20. Description including basis of estimate of present market value of special items of personal property (as example only, motorcycles, boats, skimoibles, campers, trailers, furs, jewelry, special animals, coin or gun or stamp or art or other collectibles collections, other than standard tools)

Debts:

21. Name of all bank cards, revolving charge obligations, unsecured loans, etc. (other than those already listed above with house or cars), in whose name this credit was extended, current minimum monthly payment, and current balance.

YOUR HOUSEHOLD'S BUDGET:

It is also very helpful that you have given substantial thought to your anticipated income and reasonable living needs. Pages 2 - 4 (Section 3A-I & 4 and totaled at Summary) of the required [Sworn Financial Statement](#) (JDF 1111, a court form) is a good framework to consider a budget for your household - in the circumstances you expect to find yourself after your separation and/or divorce.

FINAL NOTE:

Exchange of documentation of certain of these items are likely required, but do NOT worry or stress about any particular item in advance of our work together. We can understand better whether any particular item is important or necessary to your mediation as we meet, and I can often help you understand easier ways to obtain information we need, but that is not readily available.



Lawrence F. King, J.D., Professional Family Mediator

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