

GENERAL LIST OF TOPICS TO BE DISCUSSED AT MEDIATION

****DO NOT FILL OUT INFO ON THIS FORM – IT IS FOR YOUR REFERENCE ONLY****

Financial Decisions:

⇒ **Taxes**

- Apportioning of liability/refund for current/prior tax years (if open);
- Filing status for current year (if not divorced) – e.g., joint, married by separate, head of household, individual

⇒ **Life Insurance**

- Will life insurance be required of either spouse after the divorce?
- If yes, in what amount(s); for what length(s) of time; who will be the beneficiary (spouse or children, if any); who is liable for premium(s).

⇒ **Health Insurance**

- Will each be liable for their own coverage and out-of-pocket expenses?
- Will either spouse be required to provide coverage for the other spouse?

⇒ **Alimony** (is either spouse requesting?)

- How much money are you asking from your spouse each month?
- For how long do you need the monthly money (e.g., x number of months, x number of years, or permanently)?
- When will monthly payments begin?

⇒ **Real Property** (houses, land, condos, etc.)

- Will real property be sold or kept?
- If kept, who will own the real property after divorce?
- If kept, will either spouse buy-out the other spouse (if yes, for how much money and how will that be paid)?
- If kept, will the spouse need time to refinance the existing mortgage to remove the other spouse?
- If sold, how will the sale proceeds be allocated between both spouses?
- How will the mortgage, taxes, insurance, HOA fees, utilities, repairs be allocated between the spouses until the property is sold?

⇒ **Vehicles**

- Will vehicle(s) be sold or kept?
- If kept, who will own the vehicle(s) after divorce?
- If kept, will either spouse buy-out the other spouse (if yes, for how much money and how will that be paid)?
- If kept, will the spouse need time to refinance the existing loan/lease to remove the other spouse?
- If sold, how will the sale proceeds be allocated between both spouses?

⇒ **Pets**

- Who will own the pet(s) after divorce and be liable for expenses?

⇒ **Bank Accounts**

- How will bank accounts be allocated between the spouses?

⇒ **Brokerage Accounts**

- How will investment accounts be allocated between the spouses?

⇒ **Retirement Accounts (e.g., IRA, 401k, Pension, Defined Benefit, etc.)**

- Will retirement accounts be allocated between the spouses, or will each spouse keep their own retirement account(s)?
- If allocated, does your retirement plan need a QDRO (Qualified Domestic Relations Order) to divide it between spouses in a divorce?
- If allocated, does your retirement plan have any specific requirements necessary to be include in the settlement agreement?
- If allocated, what will be the agreed upon value of the pension to be given to the other spouse?

⇒ **Business(es)**

- Will businesses be allocated between the spouses, or will each spouse keep their own business(es)?
- If allocated, will either spouse buy-out the other spouse (if yes, for how much money and how will that be paid)?

⇒ **Miscellaneous Debts**

- If and how will miscellaneous debt(s) be allocated between the spouses?