

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?

Child-Related Decisions:

⇒ **How Will Decisions About Child(ren) Be Made (Jointly or Unilaterally) About:**

- Fundamental issues (i.e., health, education, religion);
- Extra-curricular activities;
- Summer Camp;
- How will costs be shared?

⇒ **Time-Sharing:**

- When will the child(ren) spend time/overnights with each parent;
 - What type of schedule will be created?
 - What specific nights will the child(ren) be with parent-1 and what specific nights will the child(ren) be with parent-2.
- How will holidays be dealt with?
 - Parenting Plan will list specific holidays and how allocated between parent-1 and parent-2; or
 - Parenting Plan will not allocate specific holidays.
- How will school-breaks be dealt with?
 - Parenting Plan will list school-breaks and how allocated between parent-1 and parent-2; or
 - Parenting Plan will not allocate school-breaks.

⇒ **Travel:**

- The process of each parent being able to travel with the child(ren) within the United States and Internationally?
- Will consent/permission of the other parent be required?
- Will advanced notice be sufficient?
- Any specific travel-related restrictions?

⇒ **Health Insurance & Expenses:**

- Which parent will provide health insurance?
- How will premium of health insurance be allocated among the parents?
- How will out-of-pocket health-related expenses be allocated among the parents.

⇒ **Child-Care:**

- How will decisions about child-care providers be made by the parents (for example, jointly or unilaterally)?
- How will expenses for child-care be allocated among the parent?

⇒ **Education:**

- How will expenses for education (e.g., tutoring) be allocated among the parents?

⇒ **Tax Dependents/Deductions:**

- How will the right to claim the child(ren) as dependents and claim any tax credits/benefits be allocated among the parents on their tax returns after divorce.

⇒ **Child-Support:**

- The State of Florida mandates child support.
- The monthly amount is based upon a mathematical formula, which accounts for:
 - The number of overnights per year with each parent.
 - The monthly net income of each parent.
- During the mediation, I will calculate the monthly amount of child-support using the formula.
- If you want to deviate from the calculated amount, you will need to file a motion and seek the court's approval.
- For your reference, here are links to [Section 61.29, F.S.](#) and [Section 61.30, F.S.](#) which discuss Child Support.