

**SUSAN M. FALL, PLC
MEDIATION INFORMATION WORKSHEET**

Dated: _____

Personal Information		
Information:	Spouse/ Partner 1	Spouse/ Partner 2
Full Name (include middle name):		
Home Address:		
Home Telephone No.:		
Cell Telephone No.:		
Note: Do not include a number at which you would prefer we not call or fax.		
Home Email Address:		
Note: This should be an email address at which you are comfortable receiving emails from us. Be aware that your employer has the right to view emails sent to you at work.		
Other:		
Date of Birth:		
Social Security Number:		
County of Residence:		
Highest Educational Level Achieved:		

Employment Information		
Information:	Spouse/ Partner 1	Spouse/ Partner 2
Employer:		
Occupation / Job Title		

Employer Address:		
Work Telephone No.:		
Work Fax No.:		
Gross Weekly Income:		
Income Deductions (i.e. union dues, insurance, savings, direct deposit):		
Length of time at this employer:		

Marriage

Date of Marriage	
Date of Separation:	If not, anticipated separation date:

Children Information

Full Name:	Date of Birth	Resides With:

Do you and your spouse agree as to who is to have custody of children?	„ Yes ____ No _____ If yes, who? _____
Who is carrying medical insurance for minor children and type of coverage?	„ You „ Spouse „ Both What is the total monthly cost of coverage? _____ How many family members are covered? _____
Are there daycare costs for the minor children? If so, what is the monthly cost?	

ASSETS

Real Estate:	Real Estate 1	Real Estate 2	Real Estate 3
Address of Property:			
Mortgage Holder:			
Balance of Mortgage:			
Current Market Value:			
Names of Title Owners [attach copy of deed]:			
Monthly Mortgage Payment?			
Monthly Taxes and Insurance, if not included in Mortgage payment:			

Motor Vehicles:	Vehicle 1	Vehicle 2	Vehicle 3
Type of Vehicle:			
Year, Make, Model			
Loan Holder:			
Balance of Loan:			

Monthly Loan Payment:			
Current Value of Vehicle:			
Title Owner(s) of Vehicle:			
Vehicle I.D. No.:			
Who Possesses Vehicle:			

Stocks and Bonds:			
Name of Company	No. of Shares	Present Value	Name(s) on Item

Bank Accounts:			
Type of Account [checking, savings, etc.]	Name of Institution	Approximate Amount	Name(s) on Account

Household Furnishings (of substantial value):			
Item	Approximate Value	Item	Approximate Value

Investment and Life Insurance Accounts, Pensions, Annuities, IRAs, 401(k)s				
Name on Account	Type of Account	Financial Institution	Account No.	Current Balance/ Value

DEBTS

Person or Institution Debt Owed	Name of Responsible Party	Amount Due	Monthly Payment	Reason for Debt

List any other item of property or debt not referenced above (such as any interest in any trust, safety deposit box, business or corporation, valuable stamp or coin collection, any other source of income, etc.):

Please list any assets or debts you brought to the marriage:

Please list any assets or debts your spouse brought to the marriage:

Did either you or your spouse receive any assets as the result of a gift (other than from each other) or an inheritance? If so, please explain:

List any specific concerns you have regarding mediation:

- Documentation Needed:
- Most recent bank, investment account and retirement account statements
 - Most recent pay stub showing year-to-date totals
 - Most recent statements from any debt
 - Any appraisal of any asset prepared in the last three years
 - Last three years' income tax returns