



Guiding Families and Businesses Through Transitions

MEDIATION CHECKLIST

CHILDREN

	Legal custody
	Parenting plan
	Traveling
	Moving
	Relationship with relatives
	Religion
	Emergency care

EDUCATION

	Private school
	College
	Extracurricular and summer camp
	Making decisions

PROPERTY DIVISION

	Home
	Savings and investments
	Other assets
	Retirement accounts
	Tax consequences
	Inheritances
	Personal property (art, furniture, etc.)

DEBT AND CREDIT CARDS

	Credit cards (individual and joint)
	Student loans
	Mortgage
	Other debt

SUPPORT - CHILD SUPPORT & ALIMONY

	Amount and timing
	Tax consequences
	Future adjustments
	Emancipation of children
	Remarriage and cohabitation

MEDICAL INSURANCE AND EXPENSES

	Insurance for children
	Insurance for non-employee spouse
	Uninsured medical and dental expenses

LIFE INSURANCE

	Relationship to support obligations
	Beneficiaries, proof of insurance

TAXES

	Pending refunds or liabilities
	Deductions for children
	Liabilities for past years

OTHER

	Survive or merge
	Mediation clause for future disputes
	Name change
	Parent education program
	Pets
	Statistics (birthdates, addresses, etc.)



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