

Family Financial Inventory – What you own and what you owe

To discuss issues of the distribution of property and support in mediation, please complete these forms before your appointment. To make fully informed decisions, it is important for both of you and for the process of mediation that you provide this information. In completing this form, both parties agree to fully disclose, in the presence of the other all financial statements or other information that may be needed to verify numbers, if needed.

Remember that your mediator will not offer advice on tax consequences nor counsel you on preserving the value of your investments. The Mediation Center strongly encourages you to consult a financial advisor (accountant, financial planner, professional appraiser, or investment counselor) if these questions arise. Your mediator will also not offer you legal advice or information on what is considered marital property or increases or decreases in value after the date of separation, or any other legal question. We also strongly recommend that you consult an attorney for answers to these questions.

Item Mark with an * anything than was a gift, inherited or owned before marriage.	Value *date of separation *current value *source of value	Purchase date	Names on title of account	Total debt owed	Value,minus debt
House					
Other real estate					
vehicles					
Retirement funds (note type and account number)					
Stocks, bonds, stock options (Note type and Account Number)					

Item Mark with an * anything than was a gift, inherited or owned before marriage.	Value *date of separation *current value *source of value	Purchase date	Names on title of account	Total debt owed	Value, minus debt
Tax refunds/debts					
Bank accounts (Note type and Account Number)					
Life insurance (Face/cash value & Policy Number)					
Business interest					
Miscellaneous property (Patents, trademarks, copyrights, royalties)					
Credit card debt (Note type of card, Account Number)					
Other loans					

