

FAMILY MATTERS

FINANCIAL DISCLOSURE FOR MARRIED COUPLES

Please bring the following documents with you to the first mediation if possible;-

1. Up to date valuation (preferably 3) of former matrimonial home.
2. Redemption figure for the mortgage (outstanding balance).
3. Surrender values and maturity values of endowment policies.
4. If employed, 3 most recent payslips and most recent P60.
5. If self-employed, accounts for last 3 years and last tax return.
6. Bank statements for all accounts since separation, in sole name or jointly with another.
7. Cash equivalent transfer value of all pension policies, including frozen ones, and AVC's.
8. Statements showing outstanding debts e.g. credit cards, loans, hp agreements, finance, store cards.
9. Details of shares or share save schemes including current values.
10. Statements showing value of ISA's, TESSA's, PEP's or other savings schemes.
11. Recent valuations on all other owned property e.g. rental, and mortgage statements.
12. Valuations of other assets e.g. cars, caravans, boats, timeshares or other valuable items.
13. Company accounts for the last 3 years, if applicable.
14. Shareholders' Agreements, if relevant.