

For the mediation process, these papers are required to verify income, assets and liabilities. These papers will be released back to you after submission. Originals are not necessary; copies are sufficient. Include any financial statements that may not be noted below.

1. Income:

- Pay stub or Form 1040 (first page only). Include Schedule C if self-employed, or K-1 for business.

2. Autos, Motorcycles, Recreation Equipment, Anything with a Vin Number and Registration:

- Registration papers.

3. Banking:

- Last statement that includes all accounts. We only need the first page.

4. Investments:

- Brokerage account or financial institution statement.
- Stocks, bonds, limited partnerships, etc.
- Real Estate, time shares, partnerships (including family holdings).

5. Retirement

- IRS's, 401(k) last statement.
- Pension, PERS, or other similar retirement statements.

6. Air Miles or Reward Points:

- Statement reflecting current balance on air miles or reward points.

7. Mortgage and HELOC:

- Last statement including current balance.

8. Credit Cards:

- Principle on card and last statement.

9. Student Loans:

- Last statement including current balance.

10. Personal Notes (Including Family Loans):

- Copy of the original note. Current balance and payment schedule.

11. Life Insurance:

- Statement with policy number, death benefit and listed beneficiary. This is often on the front page of the policy papers.

12. Tax statement from the county of real property, home, rentals, etc.