

## **HELPFUL INFORMATION TO ASSEMBLE (prior to discussion in mediation)**

### ***Documents and Research***

It is very helpful to obtain the following documents (or to research these matters by making notes with details of how you determined the required information) relating to:

#### **Income & Support Information:**

1. Past 3 year's tax returns
2. Last year's W-2 and/or 1099's
3. Most recent paystub from all employers showing year to date pay
4. If self-employed, or if you also own a business, special information including:
  - a. at least several past years tax returns relating to business (business tax returns or K-1's if corporation or partnership, Schedule C if sole proprietorship); and
  - b. records reflecting current gross receipts, and ordinary and necessary expenses required to produce that income.

### ***Financial Affidavit:***

As in your divorce proceeding, you will be required to file with the Court a notarized statement of your financial circumstances. This court form is known as a "Sworn Financial Statement" and is available for your convenience on our website at "Mediation Resources | [Tools & Divorce Forms](#) page.

### ***FINAL NOTE:***

Exchange of documentation of certain of these items may be required, but do NOT worry or stress about any particular item in advance of our work together.

We can understand better whether any particular item is important or necessary to your mediation as we meet, and we can often help you understand easier ways to obtain information you need, but that is not readily available.

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*Mediators*

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**Helpful Information to Assemble**  
(Divorce, Couples Seeking Modification of Spousal Maintenance)

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