

Michael J. Tremblay, Esq.

Pre-Mediation Questionnaire

CONFIDENTIAL

Instructions:

- (1) Complete every question in full. If there are none, write "none." Do not leave a blank.
- (2) Answer completely with full descriptions, i.e., dates, places, addresses, etc. Remember, the mediator will use this information to prepare your Separation Agreement. If it is incomplete, it will result in needless charges to obtain middle initials, account number, addresses, etc., so gather the information now.
- (3) Try to fit your answers on this sheet. If your answer does not fit, state "see back" and use the back or more paper if necessary, referencing the question number.
- (4) In the case of all numbers, state weekly figures unless otherwise indicated. To calculate weekly figures, divide annual figures by 52 or divide monthly amounts by 4.3.
- (5) Use a reasonable method to arrive at estimates, i.e., last year's car insurance divided by 52, or last six months of real estate taxes divided by 26, etc.
- (6) Write neatly!
- (7) Bring three copies to the next mediation session: one for you, one for the mediator and one for your spouse.

1. a. Full Name: (Maiden name if applicable):	
b. Home Address:	
c. Birth Date:	
d. SS#:	
e. Home phone #:	
f. Work phone #:	
g. Cell phone #:	

h. Your highest level of education:	
2. If employed: a. Employer and address:	
b. Title and job description	
c. Can you be called at work:	
d. Weekly Gross Income: (attach your last three pay stubs)	
e. Describe regular Bonuses, if any:	
f. Other compensation or benefits:	
g. Length with employer:	
h. If less than two years, prior employment history (employer, job description, salary, dates of employment)	
i. Do you have any retirement plan, 401(k), or IRA? State name of plan, address, account #:	
j. If so, did you attach your most recent account statement?	
k. If so, did you attach your most recent benefit booklet from your employer?	
l. Do you have a second job or other income? If so, describe:	

m. Describe all other job skills:	
3. Marriage Details: a. Date & Place Married:	
b. Date of Separation:	
c. Circumstances of Separation:	
d. Describe efforts at reconciliation of this marriage, if any:	
e Describe prior separations, if any:	
4. Children: a Full Names & Dates of Birth:	
b Living with whom:	
c School / Work of Children:	
d Special Educational or Medical Problems of Children:	
e Present Schedule for Parenting:	
f Others involved in child care:	
g Nature of their involvement:	

h Parenting Schedule:	
i Counseling or medication?	
j Are there any trust funds, external support or other income or assets of children?	
5 Prior marriages, if any: a. Date/Place:	
b. Name of Prior Spouse:	
c. When & where married	
d. When & where divorced	
e. Children of prior marriage; if any: (Names, ages, where living:)	
f. Any existing financial or custody obligations?	
6 Do you have an attorney in this matter? If so, name, address and phone number:	
7 Medical Insurance a. Name and address of health insurance and policy number:	
b. Amount of premium?	
b. Who pays the premium?	

c. Who is covered by this policy:	
d. Do you have disability income insurance? If so, name of company, address, amount and policy number:	
g. Who pays the premium?	
f. Amount of Premium:	
h. List any medical problems you have:	
i. Are you receiving psychiatric treatment or psychological counseling?	
j. Is psychiatric/ psychological care covered insurance?	
8 Life Insurance a. Name, address of all life insurance, policy number, benefit amount:	
b. Type (whole life, term, renewable term, etc.):	
c. Owner:	
d. Insured:	
e. Cash surrender value:	
f. Loans against:	

g. Premium:	
h. Who pays:	
9 Do you have a Will?	
10. Income and expenses. – Complete and attach the Probate Court Financial Statement. Show your personal current expenses as they exist now.	
11 Assets and Liabilities. Complete and attach the Probate Court Financial Statement.	
12 Tax Returns – Attach last three complete Federal and Massachusetts Tax Returns:	
13 Gifts prior to marriage: (i.e., Wife’s parents gave \$25,000 to help buy house, etc.)	
13 Gifts during to marriage:	
14. If there is other real estate acquired during the marriage? (i.e., vacations cottage, time-share, condo, etc.)	
15. Are there other Assets not shown on your financial statement?(i.e., business interests, stock options, expected gifts, inheritances, etc.)	
16. Are there personal effects of significant value, such as cars, furniture, books, silver, jewelry, collections?	
17. How are household expenses met now?	

a. Who pays the bills?	
b. How much does each contribute?	
18. Marital home:	
a. In whose name:	
b. Approximate fair market value:	
c. Balance of unpaid mortgage:	
d. How much did you pay for the house? What year?	
e. Who contributed what to the down payment?	
19. Outstanding credit card and other debts, amounts, account numbers, purpose of charges and who should be responsible:	
20 Have there been written proposals exchanged? If so, attach them all.	
21 Are there proposals you wish to make now? If so, state them:	
22 Other facts, circumstances you feel are important you want the mediator to know:	