

5. Settlement Attempts to date Including Demands and Offers:

6. Please complete the attached financial forms and return them with this Case Summary:

7. For the mediation session on dividing assets and liabilities, you/your client will be required to bring the following documentation:
 - a. **Appraisals of any real property**
 - b. Appraisals of other significant assets, such as jewelry and collections
 - c. Documentation showing current payoff balances on mortgages
 - d. Current retirement plan statements
 - e. Pension valuations
 - f. Deeds to real property
 - g. Insurance policies - cash value and benefit documentation
 - h. Current checking account statements
 - i. Current savings account statements
 - j. Documentation for ownership and value of Certificates of Deposit, stocks, bonds, etc.
 - k. Vehicle titles
 - l. Payoff balance documentation for vehicles
 - m. Documentation regarding any settlements owed either of the parties

8. For the mediation session on budgeting, please bring the following documentation:
 - a. Income tax returns for the past 3 years
 - b. Pay stubs for the past 90 days

NAME OF ATTORNEY

ADDRESS

PHONE

ATTORNEY FOR