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Focused on what is important to you.

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### Mediation Client Information Questionnaire

It is important that you complete the following questionnaire as fully and accurately as possible. You will be paying for the time that your mediator spends on your case and you will save fees by providing her with complete information at the earliest possible time. This form is intended to alert your mediator to issues which need special attention and to provide necessary information. Your mediator does not know the facts as well as you do. Complete this form to the best of your ability and provide your mediator with all relevant documentation, including copies of your tax returns for the past two years. If you have a financial statement, please include it. Please also provide your mediator with copies of any and all court filings. Pages 6-7 of this questionnaire will not be shared with the other party. If you need additional space, please feel free to attach extra pages.

\*Required fields to be completed prior to turning into The Reynolds Law Firm.

Your full legal name:\* \_\_\_\_\_

Preferred name: \_\_\_\_\_ Today's date: \_\_\_\_\_

Attorney's name: \_\_\_\_\_

Home address:\* \_\_\_\_\_

City/State/Zip:\* \_\_\_\_\_

Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_

All names previously used, including maiden (if applicable):\* \_\_\_\_\_

Date of Birth:\* \_\_\_\_\_ Birthplace:\* \_\_\_\_\_  
(Month/Day/Year) (State, Territory, or Foreign Country)

Social Security Number:\* \_\_\_\_\_ ID or Driver's License number:\* \_\_\_\_\_

Date of Marriage: \_\_\_\_\_ Place of marriage: \_\_\_\_\_  
(City, County, State)

Are you physically separated: \_\_\_\_\_ Date of separation: \_\_\_\_\_

How many times married? \_\_\_\_\_ How did they end? \_\_\_\_\_

Do you have a new partner? \_\_\_\_\_ If so, name of new partner? \_\_\_\_\_

Are you an Oregon resident? \_\_\_\_\_ For how long? \_\_\_\_\_

Education (specify only highest grade completed):

Elementary/Secondary (1-12): \_\_\_\_\_ College (1-4 or 5+): \_\_\_\_\_

Employer: \_\_\_\_\_ Position: \_\_\_\_\_

How long with this employer? \_\_\_\_\_

Net monthly income (wages, interest, etc.): \_\_\_\_\_

\_\_\_\_\_

Gross monthly income (wages, interest, etc.): \_\_\_\_\_

Counselor/Therapist: \_\_\_\_\_

\_\_\_\_\_

Currently? Individual? Couple? \_\_\_\_\_

**CHILDREN OF THIS MARRIAGE** (including adult and deceased children)

Full Legal Name	Date of Birth/Date of Death	SS#
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Number of children of this marriage: \_\_\_\_ Number of children not of this marriage: \_\_\_\_

1. What are your current parenting arrangements? (include any child support or other financial support information) \_\_\_\_\_  
\_\_\_\_\_
2. Are you satisfied with these arrangements? \_\_\_\_\_
3. How could these parenting arrangements be improved? \_\_\_\_\_  
\_\_\_\_\_
4. Please describe your employment or daily activities: \_\_\_\_\_  
\_\_\_\_\_
5. How do you like to spend your free time? \_\_\_\_\_

**REAL PROPERTY:** (Please provide your mediator with copies of all ownership, financing and valuation documents; including all deeds, mortgages, trust deeds, land sale contracts, current property tax statements and any appraisals or market analyses.)

Street Address	City	State	Approximate Value Of Loan Balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**PERSONAL PROPERTY:**

**Vehicles** (including cars, trucks, boats, trailers, RVs, etc.)

Year, Make & Model	Lic # & State	Used By	Blue Book Value	Loan Balance
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Checking and Savings Accounts** (Please provide copies of current statements)

Name of Bank, CU, or S&L	Branch	Whose Name	Savings or Checking	Current Balance
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Valuables** you would like specially considered in the mediation (collections, china, jewelry, etc.)

Item	Value
_____	_____
_____	_____
_____	_____
_____	_____

**Other significant items of property**, including stocks, partnership interests, other business interests and investments, owned by either party or both not listed above. Please describe and provide relevant documentation.

Item	Value
_____	_____
_____	_____
_____	_____
_____	_____

**INSURANCE**

**Medical Insurance:** What medical/dental/optical, etc. insurance coverage, if any, does the family have? Please describe company, coverage, deductible, paid for directly or through employment, etc.:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Life Insurance:**

Company	Policy #	Type (Term, Universal, Whole, etc.)	Cash Value
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Deferred Income Plans** (IRAs, Pensions, Profit Sharing Plans, Annuities, etc. Please provide descriptive material and copies of current statement/valuations.)

Plan	Terms	Present Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Taxes** Is there a tax refund due to either you or your spouse? \_\_\_\_\_

How much? \_\_\_\_\_

**Debts** (Including all mortgage, auto and credit card payments)

Name of Creditor	For What?	Balance Owing	Monthly Payment
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

This request for information is continuing. Should additional information become known during the mediation, or the information provided need updating, please provide this further information to your mediator at the earliest opportunity. Thank you.

# CONFIDENTIAL

*Responses to the following questions are confidential between you (individually) and the mediator.*

Overall, what outcomes do you hope to create through your mediated agreement?

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Please describe any things you would like recognized or acknowledged by your partner:

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Please describe any particular concerns you may have about entering into mediation:

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Please describe how disagreements were typically handled in your relationship:

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Is there current physical, emotional, or mental abuse or other intimidation in the relationship which might make it difficult for you to engage in mediation or be in the same room with your spouse? Please describe:

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Are you interested in reconciliation?

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Is there any other relevant information you would like your mediator to be aware of?

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