

A GUIDE FOR THOSE CONSIDERING MEDIATION

The Peaceful Divorce Preparation Guide

What to Gather, Consider, and Discuss Before Mediation

A practical first-step guide for individuals and families considering divorce mediation

Gather

Consider

Discuss

Three practical steps you can begin before your first meeting

*Includes practical checklists, preparation prompts,
and a first-meeting worksheet*

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Starting with Clarity

Most people arrive at mediation with more questions than answers. That is the normal starting point, and it is not a problem to be solved before you begin.

This guide is designed to help you take the first practical steps: understanding what mediation involves, gathering the information the process will need, and identifying which questions matter most to you. None of that requires you to have decided anything yet.

What this guide will help you do

- Understand what divorce mediation is, and what it can and cannot do.
- Begin gathering the documents that almost every case eventually needs.
- Identify the parenting and financial topics that may need discussion in your family.
- Sort out which questions belong to a mediator, and which need an attorney, an accountant, or another qualified professional.
- Arrive at a first meeting organized, and with your own questions written down.

How to use this guide

If you are	Start with
Just beginning to consider mediation	Pages 3 and 4
Ready to get organized	Pages 5, 6, and 7
Preparing for a first meeting	Pages 8 and 9

Read it in any order. Write in it. Some pages have space for your own notes, and those notes are yours alone — nothing in this guide is submitted to anyone.

About this guide. This guide provides general educational information about the mediation process. It does not provide legal, financial, tax, or mental-health advice, and it does not replace independent advice from your own professionals. Reading it does not create a mediator-client relationship. Every family's circumstances differ, and what applies generally may not apply to you.

NOTES AND QUESTIONS TO RAISE

What Mediation Can Help You Do

In mediation, a neutral third person helps two people reach their own decisions. The mediator does not decide anything, and does not represent either person.

	What happens	What it looks like in practice
1	Identifying the decisions that need to be made	Working out which issues your situation actually contains — parenting, property, support, insurance, taxes, and the practical steps that follow.
2	Exchanging relevant information	Both people provide the documents and figures the decisions depend on, so that choices are made on the same set of facts.
3	Exploring possible options	Generating more than one workable approach to an issue before evaluating any of them, and testing each against its practical and financial consequences.
4	Developing workable agreements	Recording what you have decided in specific terms — amounts, dates, and who is responsible — rather than in general language.
5	Deciding when outside guidance is needed	Recognizing which questions belong to your own attorney, an accountant, an appraiser, or another professional, and getting those answers before deciding.

Mediation does not require you to agree in advance, to have a good relationship with the other person, or to give up the right to your own attorney's advice. Each person may consult an independent attorney during the process and is encouraged to obtain legal review before signing a final agreement.

Mediation may not be appropriate when...

- There are immediate safety concerns for anyone in the family.
- Either person is unable to participate voluntarily, or feels unable to speak freely.
- There is serious intimidation, or one person cannot make decisions without significant pressure from the other.
- Necessary information cannot be exchanged, or one person is unwilling to provide it.

These are questions of fit, not judgments about anyone. A mediator will discuss suitability with each person separately, and other paths exist where mediation is not the right one. If anyone is in immediate danger, contact emergency services.

NOTES AND QUESTIONS TO RAISE

Preparing Yourself for the Process

Preparation is mostly a matter of sorting: what you already know, what you need to find out, and what you would like to say clearly when the time comes.

Ask yourself	Why it helps
What concerns me most about the months ahead?	Naming a concern makes it possible to address it directly, rather than having it surface indirectly in every conversation.
What do I need to understand better before I could decide anything?	Most stuck decisions are information problems rather than disagreements.
What am I ready to discuss now, and what would I rather come back to?	Sequencing is a legitimate request. Not everything has to be taken in one order.
What will require information I do not currently have?	Identifying this early prevents a long wait later in the process.
What would help me participate productively?	Timing, format, notes, or a consultation beforehand — practical things that make a difficult conversation more workable.

Before mediation, I want greater clarity about...

Five lines, for your own use. There are no right answers, and nobody will ask to see this.

If a question occurs to you between now and your first meeting, add it here. Written questions are answered more often than remembered ones.

Documents to Begin Gathering

Some records take weeks to obtain, so starting early is the single most useful thing you can do. Gather what you can, and note what you cannot — both are useful.

Category and typical documents	Have it	Requested
☐ Income Recent pay statements; last two or three years of tax returns with all schedules; W-2 and 1099 forms; documentation of bonuses or variable income		
☐ Bank and investment accounts Recent statements for checking, savings, money market, and brokerage accounts		
☐ Retirement Recent statements for retirement accounts and pensions; plan summaries; any statement of equity or deferred compensation		
☐ Debts Statements for credit cards, loans, student loans, and any personal or family loans		
☐ Real estate The deed; recent mortgage and home-equity statements; the property tax bill; any existing appraisal		
☐ Insurance Declarations pages for health, life, auto, and property coverage, with the cost of coverage		
☐ Taxes Filed returns; any notice, assessment, or payment plan		
☐ Business interests, when applicable Business tax returns; year-end financial statements; any partnership or operating agreement		
☐ Existing court orders or agreements Any order, filed document, or written agreement already in place		
☐ Children's schedules and records, when applicable The school calendar; activity schedules; medical or educational plans relevant to scheduling		

The documents any particular family needs depend on its circumstances. This list is a practical starting point, not a complete or legally exhaustive one, and a mediator or either person's attorney may ask for additional information.

NOTES AND QUESTIONS TO RAISE

Parenting Topics to Consider

If you have children, these are the topics that usually need working through. Reading the list is often the first moment the task feels finite.

Topic	What it usually covers
Regular parenting schedule	Where the children are during a typical week, written as days and times
Holidays and school breaks	How each occasion is handled, including observances that matter to your family and those whose dates change each year
Transportation and exchanges	Where handoffs happen, at what time, and who drives in each direction
Education	School choice, records and portal access, conferences, and who decides what
Medical care	Choice of providers, routine and non-routine care, records, and emergencies
Activities	Who signs children up, who transports them, and how the cost is shared
Parent communication	How the two of you will exchange information, and how quickly
Travel	Notice before a trip, information provided, and arrangements for travel documents
New expenses and changing needs	How costs are approved and reimbursed, and how the arrangement adapts as children get older
How future decisions will be made	What happens when something needs to change, and how disagreements are handled

What does a workable parenting arrangement need to account for in your family?

Work, distance, school, health, activities, extended family — whatever is genuinely true of your situation.

Your Priorities and Questions

A worksheet for your own use. Bring it to a first meeting if you find it helpful.

THE THREE ISSUES MOST IMPORTANT TO ME

	The issue	Why it matters to me

QUESTIONS I NEED ANSWERED

INFORMATION I AM STILL MISSING

WHERE I MAY NEED ADVICE FROM A PROFESSIONAL

The question	Attorney	Accountant	Financial	Other

TOPICS I BELIEVE MAY BE EASIER TO RESOLVE

TOPICS THAT MAY REQUIRE MORE TIME

First Mediation Session Checklist

A short list. Nothing on it is complicated, and doing most of it is enough.

	Before the meeting	What it involves
☐	Confirm the meeting details	Date, time, length, location or video link, and who will attend
☐	Review the mediation agreement and introductory materials	Read them before the meeting, and mark anything you want explained
☐	Gather the documents you already have	Bring what you have; a complete set is not expected at a first meeting
☐	Write down your questions	Including the ones that feel too obvious to ask — those are often the useful ones
☐	Note anything that cannot wait	A bill due, an enrollment deadline, a decision about a child that is already pending
☐	Prepare to hear a different account of the same events	You will not agree on everything, and the meeting does not require you to
☐	For a video meeting, arrange privacy and reliable technology	A room where you will not be overheard, a tested connection, and headphones
☐	Bring a calendar and something to write with	Scheduling and homework are usually part of a first meeting
☐	Expect the first meeting to be a beginning	No one is expected to settle every issue, or any issue, in a first session

NOTES

Your Next Step

If mediation turns out to fit your situation, the work is more structured than most people expect — and considerably less overwhelming as a result.

Clients receive selected sections of the Peaceful Divorce Mediation Workbook based on their family's needs and the stage of the process. They are guided through only the preparation pages, organizational tools, and decision records relevant to their situation.

The workbook covers	For example
Orientation and process	How mediation works, and what to expect
Private preparation	Pages you complete for yourself, which are never collected
Parenting	Information about your children, and a record of each decision
Financial information	A complete, sourced picture of income, assets, and debts
Decisions	One structured record per issue, worked through in turn
Summary and implementation	A written summary for your attorneys, and the steps that follow

If you are considering divorce mediation and would like to learn whether this process may fit your family, you may schedule an introductory consultation. There is no obligation, and the conversation is a chance to ask questions before deciding anything.

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One last thing. Whatever you decide about mediation, the preparation in this guide is not wasted. Gathering documents, listing your questions, and identifying what matters most to you is useful in any process — and it is work you will not have to repeat.

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