

OWNER'S QUESTIONNAIRE

This form should be completed if you would like your case evaluated to determine if it is appropriate for mediation.

Name: _____

Case Number: _____

Attorney: _____

* only applicable if an attorney has been retained. An attorney is **NOT** required for mediation.

Address: _____

Telephone: _____

The mediator will need to review the following documents. Some of the documents may not be applicable to your specific situation. Please provide as many documents as possible. If documents are not available, the case may still meet the requirements for mediation. Original documents are not required. Copies of documents are acceptable. **ALL DOCUMENTS MUST BE WELL ORGANIZED OR THE MEDIATOR WILL REJECT THEM.**

ASSETS & INCOME

1) What is your current annual income? _____

What is your current monthly income? _____

Please provide the following information:

- a) Employer's name, address, and length of time that you have worked for current employer:

 - b) Last two months pay stubs
 - c) If you are salaried or hourly employee, provide W-2s from the past two years tax returns
 - d) If you are self-employed, tax returns for the previous two years, including all schedules and a YTD profit and loss statement
- 2) Do you own rental property? YES or NO
- a) If yes, please list your monthly rental income:

 - b) If you own rental property, provide the rental agreement and tax returns for

the previous two years including all schedules

- 3) What is the total balance in your savings accounts? _____
What is the total balance in your checking accounts? _____
What is the total balance in your brokerage accounts? _____
What is the total balance in your retirement accounts? _____
- a) Please provide the most recent three months statements for checking, savings, brokerage, and retirement accounts
- 4) What is your monthly income from 401k and/or retirement programs? _____
What is your yearly income from 401k and/or retirement programs? _____
- a) Please provide any 401k and other retirement account information verifying your income
- 5) What is your monthly disability income? _____
- a) Please provide proof of the last three months of disability income
b) Expected disability income and date expected:
- 6) What is your monthly income from alimony and/or child support? _____
- a) Please provide proof of alimony and/or child support
- 7) Please provide the make, model, year, and approximate value for the following:
- a) vehicles _____
b) boats _____
- 8) Please provide the address and approximate value of any real estate owned:
- 9) If you filed a bankruptcy in the past seven years, please provide a list of all bankruptcy case numbers:

LIABILITIES

- 1) Please provide the amount of total monthly payments for the following:
- a) car/boat loans: _____

- b) credit card debt: _____
- c) real estate loans: _____
- d) alimony: _____
- e) child support: _____
- f) student loans: _____

Please provide the last three months statements for the following:

- a) automobile loans/boat loans
- b) revolving charge/credit card amounts
- c) real estate loans
- d) alimony
- e) child support
- f) student loans

2) List the amount of any outstanding judgments against you:

3) Please list your total monthly utility payments for the following:

- a) cable/internet: _____
- b) electricity: _____
- c) gas: _____
- d) water: _____
- e) house phone: _____
- f) cell phone: _____
- g) HOA fees: _____

4) Please provide the amount of your monthly medical expenses:

- a) health insurance: _____
- b) medical bills: _____

Please use the space below to write any other information that you would like the mediator to consider: