

CONFIDENTIAL MEDIATION QUESTIONNAIRE  
(To be filled out by each party)

Date: \_\_\_\_\_, 20\_\_\_\_ Referred by: \_\_\_\_\_

YOUR full name: \_\_\_\_\_ Atty? \_\_\_\_\_

Address: \_\_\_\_\_

Phone (Home) \_\_\_\_\_ (Work) \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

Place of Birth: \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Gross/net mo. income: \_\_\_\_\_ / \_\_\_\_\_ From other sources? \_\_\_\_\_

Oregon resident 6 months? \_\_\_\_\_ On welfare past year? \_\_\_\_\_

No. this marriage? \_\_\_\_\_ No. of children by all marriages? \_\_\_\_\_

Your (or spouse) maiden name: \_\_\_\_\_

Your (or spouse) former married name(s): \_\_\_\_\_

Date of marriage: \_\_\_\_\_ Place of marriage: \_\_\_\_\_

Any other suits/petitions for support pending? \_\_\_\_\_

Date of separation: \_\_\_\_\_ Who stayed in family home? \_\_\_\_\_

SPOUSE'S full name: \_\_\_\_\_ Atty.? \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

Place of Birth: \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Gross/net mo. income: \_\_\_\_\_ / \_\_\_\_\_ From other sources? \_\_\_\_\_

No. this marriage: \_\_\_\_\_ No. children by all marriages: \_\_\_\_\_

Your education: \_\_\_\_\_ yrs/ Spouse education: \_\_\_\_\_ yrs

CHILDREN of this marriage (names/addresses/soc. sec. numbers):

1. \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

2. \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

3. \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

4. \_\_\_\_\_ SSN \_\_\_\_\_ DOB \_\_\_\_\_

Residential history of children since separation:

\_\_\_\_\_

PRIMARY ASSETS of marriage and estimate of net equity value:

A. Real Estate (indicate address or location)

	Property Description	Your Opinion of Value	Present Indebtedness	Identity of Lender
1.	_____	_____	_____	_____
	_____	_____	_____	_____
2.	_____	_____	_____	_____
	_____	_____	_____	_____
3.	_____	_____	_____	_____
	_____	_____	_____	_____

B. Cash/Checking & Savings Accounts/etc:

Bank	Acct. No.	Approx. Bal.
1. _____	_____	\$ _____
2. _____	_____	\$ _____
3. _____	_____	\$ _____
4. _____	_____	\$ _____
5. _____	_____	\$ _____

C. Stock Accounts/Mutual Funds/Bonds/etc:

	Location or Broker	Acct. No.	Approx. Value	Source
1.	_____	_____	\$ _____	_____
2.	_____	_____	\$ _____	_____
3.	_____	_____	\$ _____	_____
4.	_____	_____	\$ _____	_____
5.	_____	_____	\$ _____	_____

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D. Retirement/Pension Rights/IRAs/etc. - Either Party (Attach vesting and maturity pamphlets or other information):

In Whose Name	Employer/Plan Name	Acct. No.	Est. of Val.
1. _____	_____	_____	\$ _____
2. _____	_____	_____	\$ _____
3. _____	_____	_____	\$ _____
4. _____	_____	_____	\$ _____
5. _____	_____	_____	\$ _____

E. Business interests (Please indicate whether corporate, partnership, sole proprietorship):

Name of Business	Location	Nature of Interest	Est. Value
1. _____	_____	_____	\$ _____
2. _____	_____	_____	\$ _____
3. _____	_____	_____	\$ _____

F. Vehicles (include year, make, license number, registered owner and debt):

Year/Make	License No.	Registered Owner	Value	Indebtedness
1. _____	_____	_____	\$ _____	\$ _____
2. _____	_____	_____	\$ _____	\$ _____
3. _____	_____	_____	\$ _____	\$ _____

G. Personal property (including household furniture and furnishings, tools, recreational/camping equipment, gold/silver/jewelry, etc.):

LIST EACH ITEM ON THE "JOINT PROPERTY LIST" ATTACHED TOGETHER WITH YOUR OPINION OF THE TRUE CASH (NOT REPLACEMENT) VALUE OF EACH ITEM AND YOUR WISHES REGARDING DISPOSITION OF THE ITEM.

H. Other assets and/or add'l info. on listed assets: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

INDEBTEDNESS NOT LISTED ELSEWHERE:

Creditor/Address	Acct. No.	Balance	Monthly Payment
1. _____		\$ _____	\$ _____
2. _____		\$ _____	\$ _____
3. _____		\$ _____	\$ _____
4. _____		\$ _____	\$ _____
5. _____		\$ _____	\$ _____
6. _____		\$ _____	\$ _____
7. _____		\$ _____	\$ _____

PLEASE PROVIDE ESTIMATED MONTHLY BUDGET LIVING SEPARATELY (estimate expenses if necessary):

INCOME:

- A. Monthly Gross Income:
- B. Mandatory withholding:
- C. Voluntary withholding:
- D. Monthly Net Income:

EXPENSES:

A. For children only (if living with you):

- 1. School expenses
  - a. Lunches
  - b. Books, tuition
  - c. Activities
  - d. Other (specify)
- 2. Food (other than school lunches)
- 3. Day Care
- 4. Clothing
- 5. Medical insurance premiums
- 6. Unreimbursed health costs
- 7. Baby sitting (not work related)
- 8. Lessons
- 9. Grooming needs
- 10. Hobbies, Recreation
- 11. Entertainment
- 12. Allowances
- 13. Transportation (gas, oil, insurance for driving age child)
- 14. Miscellaneous (specify)

**TOTAL EXPENSES FOR CHILDREN:**

B. FOR YOURSELF ONLY:

FIXED COSTS:

- 1. Resident:
  - a. Mortgage or rent
  - b. Property taxes if not included in mortgage)

- c. Second mortgage
  - d. Other (specify)
  - 2. Utilities
    - a. Electricity
    - b. Heat (if other than electricity)
    - c. Water
    - d. Garbage
    - e. Telephone
    - f. Other (specify)
  - 3. Transportation
    - a. Car payments
    - b. Gas & Oil
    - c. Maintenance & repairs
    - d. Other (specify)
  - 4. Insurance
    - a. Life
    - b. Auto
    - c. Medical/Dental
    - d. Residence
  - 5. Food & Household Items
  - 6. Clothing
  - 7. Medicine & pharmacy (unreimbursed med/den costs)
  - 8. Court ordered support payments if any
- TOTAL FIXED COSTS**

CONSUMER OBLIGATIONS:

Name of Creditor/ Balance Due/ Monthly Payments:

**TOTAL CONSUMER OBLIGATIONS:**

DISCRETIONARY EXPENSES:

- 1. Entertainment
- 2. Vacations
- 3. Gifts
- 4. Religious or charitable contributions
- 5. Dues and subscriptions
- 6. Club Memberships and dues

**TOTAL DISCRETIONARY EXPENSES:**

ADDITIONAL EXPENSES:

(list)

**TOTAL ADDITIONAL EXPENSES:**

**SUMMARY:**

Gross Monthly Income  
 Mandatory Deductions:  
 Voluntary Deductions:  
 Net Monthly Income:  
 Total Children's Expenses  
 Total Fixed Expenses  
 Total Consumer Obligations  
 Total Discretionary Expenses  
 Total Additiona Expenses



**"REQUIRED DOCUMENTS"**

**107.089 Documents parties must furnish to each other; effect of failure to furnish.**

(1) If served with a copy of this section as provided in ORS **107.088**, each party in a suit for legal separation or for dissolution shall provide to the other party copies of the following documents in their possession or control:

(a) All federal and state income tax returns filed by either party for the last three calendar years;

(b) If income tax returns for the last calendar year have not been filed, all W-2 statements, year-end payroll statements, interest and dividend statements and all other records of income earned or received by either party during the last calendar year;

(c) All records showing any income earned or received by either party for the current calendar year;

(d) All financial statements, statements of net worth and credit card and loan applications prepared by or for either party during the last two calendar years;

(e) All documents such as deeds, real estate contracts, appraisals and most recent statements of assessed value relating to real property in which either party has any interest;

(f) All documents showing debts of either party, including the most recent statement of any loan, credit line or charge card balance due;

(g) Certificates of title or registrations of all automobiles, motor vehicles, boats or other personal property registered in either party's name or in which either party has any interest;

(h) Documents showing stocks, bonds, secured notes, mutual funds and other investments in which either party has any interest;

(i) The most recent statement describing any retirement plan, IRA pension plan, profit-sharing plan, stock option plan or deferred compensation plan in which either party has any interest; and

(j) All financial institution or brokerage account records on any account in which either party has had any interest or signing privileges in the past year, whether or not the account is currently open or closed.