DIRECT MEDIATION SERVICES

DOWNLOADABLE GUIDE

Divorce mediation document checklist

A practical UK checklist to help you organise the personal, financial, property, pension and parenting information that may be needed during divorce mediation.

Name	Date started

Mediator / Service	Next appointment

Important This checklist is a general preparation tool for family mediation in England and Wales. Your mediator may ask for more, fewer or different documents depending on your circumstances. Do not send confidential information by an insecure method.

How to use this checklist

Tick each item once you have located a complete and legible copy. Where a document does not apply, write N/A beside it. Keep the original files and follow the secure upload or exchange process provided by your mediator.

1. Start with the issues. Identify whether mediation will cover finances, property, pensions, children or several topics.

2. Use current evidence. Check dates and request updated valuations or statements where older records no longer reflect the position.

3. Include individual and joint finances. Relevant accounts, assets and debts should not be omitted because they are held in one name.

4. Explain gaps. Note why a document is unavailable and what you have done to obtain it.

5. Check before sending. Make sure every page is included and warn your mediator about confidential addresses or safeguarding concerns.

My mediation may cover	☐ Finances ☐ Property ☐ Pensions ☐ Children ☐ Maintenance ☐ Other
Information period requested	From ________________________ to ________________________

1. Personal and legal documents

- ☐ Proof of identity
  A valid passport, driving licence or another form of photographic identification, if requested.
- ☐ Proof of address
  A recent utility bill, council tax statement or bank correspondence, where required.
- ☐ Current contact details
  Telephone number, email address and correspondence address. Tell your mediator if any detail must remain confidential.
- ☐ Marriage or civil partnership certificate
  A copy may be useful to confirm names and key dates.
- ☐ Divorce or dissolution documents
  The application, conditional order, final order or other relevant papers already issued.
- ☐ Prenuptial or postnuptial agreement
  Include any agreement signed before or during the marriage.
- ☐ Separation agreement
  Provide any formal or informal written agreement already reached.
- ☐ Existing court orders
  For example, child arrangements, maintenance, occupation, non-molestation or previous financial orders.

2. Income and employment

- ☐ Recent payslips
  Include enough payslips to show regular income, overtime, bonuses or commission.
- ☐ Latest P60
  Your most recent annual summary of pay and tax.

- ☐ Employment contract or remuneration statement
  Useful where salary includes allowances, bonuses, shares or other benefits.
- ☐ Evidence of bonuses and benefits
  Recent bonus statements, commission records, benefits in kind or share option information.
- ☐ Benefit or pension income statements
  Evidence of Universal Credit, state benefits, pension income or other regular payments.
- ☐ Maintenance received
  Details of any maintenance received from a previous relationship.
- ☐ Self-assessment tax returns
  Usually relevant for self-employed people, partners and company directors.
- ☐ Tax calculations
  Recent HMRC tax calculations or equivalent records.
- ☐ Business accounts
  Recent annual accounts and, where relevant, current management accounts.
- ☐ Evidence of drawings or dividends
  Statements showing income taken from a company, partnership or business.

3. Bank accounts, savings and investments

- ☐ Current account statements
  Statements for every personal and joint current account, including rarely used accounts.
- ☐ Savings and building society statements
  Include cash savings, notice accounts and fixed-term deposits.
- ☐ ISA statements
  Current valuations and statements for cash or investment ISAs.
- ☐ Online payment accounts
  Relevant balances and statements for digital wallets or payment platforms.
- ☐ Investment portfolio statements
  Current valuations for shares, funds, bonds and managed portfolios.
- ☐ Cryptocurrency records
  Wallet balances, exchange statements and transaction information where relevant.
- ☐ Overseas account statements
  Records for any account or investment held outside the United Kingdom.
- ☐ Money held for or by another person
  Explain any funds held on trust, informally, or in another person’s name.

4. Property and mortgages

- ☐ Land Registry or title information
  Ownership details for the family home and every other property interest.
- ☐ Recent mortgage statements
  Show the outstanding balance, account details and monthly payment.
- ☐ Property valuations
  A recent estate agent, surveyor or jointly agreed professional valuation.
- ☐ Secured loan statements
  Details of second charges or other borrowing secured against property.
- ☐ Tenancy agreements
  For rental properties or where either participant rents their home.
- ☐ Rental income records
  Statements, accounts or tax records showing income and related costs.
- ☐ Service charge and ground rent information
  Relevant for leasehold properties.
- ☐ Early repayment charge information
  Check whether selling or refinancing would trigger a fee.
- ☐ Overseas property documents
  Ownership, mortgage and valuation information for property abroad.

5. Pensions and retirement benefits

- ☐ Cash Equivalent Transfer Value
  A recent CETV for each workplace or private pension, where available.
- ☐ Pension benefit statements
  Current statements for defined contribution and defined benefit schemes.
- ☐ State Pension forecast
  A current forecast can help clarify expected retirement income.
- ☐ Pensions already in payment
  Statements showing gross and net pension income.
- ☐ Public-sector or specialist scheme information
  For example NHS, armed forces, police, teachers or final salary pensions.
- ☐ Pension sharing or attachment orders
  Copies of any existing orders affecting pension benefits.

6. Debts and credit commitments

- ☐ Credit card statements
  Show the current balance, minimum payment and recent activity.
- ☐ Personal loan agreements
  Include the outstanding balance, monthly payment, interest rate and remaining term.
- ☐ Overdraft statements
  Details of authorised and unauthorised overdraft borrowing.
- ☐ Vehicle finance agreements
  Hire purchase, personal contract purchase, lease or other finance documents.
- ☐ Student loan information
  Current balance or repayment details where relevant.
- ☐ Tax liabilities
  HMRC demands, unpaid tax, payment plans or expected liabilities.
- ☐ Loans from family or friends
  Evidence of the amount, purpose, repayment terms and payments already made.
- ☐ Personal guarantees
  Information about guarantees given for business or third-party borrowing.

7. Business interests, trusts and valuable assets

- ☐ Company or partnership accounts
  Recent accounts and current management information where available.
- ☐ Shareholder or partnership agreements
  Documents showing ownership, voting rights and restrictions.
- ☐ Business valuations
  Any existing independent valuation or agreed expert report.
- ☐ Company share information
  Share certificates, option schemes and details of direct or indirect ownership.
- ☐ Trust documents
  Information about interests as a beneficiary, trustee or settlor.
- ☐ Valuable personal belongings
  Valuations for vehicles, jewellery, artwork, collections or other significant items.

8. Household spending and future needs

- ☐ Income and expenditure schedule
  A realistic summary of current and expected monthly spending.
- ☐ Mortgage or rent payments
  Statements or agreements confirming housing costs.
- ☐ Council tax and utility bills
  Recent bills for council tax, energy, water, internet and telephone.
- ☐ Insurance premiums
  Home, vehicle, life, health and other regular insurance costs.
- ☐ Transport costs
  Vehicle finance, fuel, public transport, parking and essential travel.
- ☐ Healthcare costs
  Regular prescriptions, treatment, therapy or insurance expenses.
- ☐ Debt repayments
  Monthly payments for loans, cards and other liabilities.
- ☐ Expected future housing costs
  Estimates for rent, mortgage, deposits, moving or essential setup costs.

9. Documents and information concerning children

- ☐ Current care schedule
  A calendar showing school nights, weekends, holidays and handovers.
- ☐ School timetable and term dates
  Include nursery, school, college and relevant activity schedules.
- ☐ Childcare arrangements
  Nursery, childminder, after-school club and other regular care information.
- ☐ Healthcare information
  Relevant appointments, medication, allergies, disabilities or additional needs.
- ☐ Proposed parenting schedule
  A practical starting proposal covering ordinary weeks and special occasions.
- ☐ Holiday and travel proposals
  Ideas for school holidays, passports, travel consent and communication.
- ☐ Child-related costs
  Nursery, school meals, uniforms, transport, clubs, healthcare and other regular expenses.
- ☐ Child maintenance information
  Existing calculations, agreements, payments or Child Maintenance Service correspondence.

10. Pets and other practical information

- ☐ Purchase or adoption documents
  Records that may help clarify ownership and background.
- ☐ Microchip and registration information
  Current registered keeper details.
- ☐ Veterinary and insurance records
  Relevant medical history, insurance cover and ongoing costs.
- ☐ Care routine and expenses
  Feeding, exercise, medication, grooming, boarding and regular responsibilities.

Final preparation before your session

- [ ] I have listed the decisions that still need to be made.
  Keep the list focused on current issues rather than the full history of the relationship.
- [ ] I have separated facts from proposals.
  Financial disclosure records facts. Suggested outcomes can be discussed separately.
- [ ] I have prepared more than one workable option.
  Consider affordability, timing, housing and the needs of every child.
- [ ] I have checked that documents are complete and readable.
  Include continuation pages and avoid cropped screenshots where full statements are available.
- [ ] I have identified unusual transactions or recent changes.
  Be ready to explain transfers, new borrowing, changes in income or major expenditure.
- [ ] I have told the mediator about confidential information.
  Flag protected addresses, safeguarding concerns or documents needing careful handling.
- [ ] I have kept copies of everything supplied.
  Retain a clearly organised personal copy of the disclosure pack.

Documents that may be produced during mediation

- [ ] Open Financial Statement
  A record of the factual financial information disclosed by both participants.
- [ ] Memorandum of Understanding
  A summary of proposals reached in mediation. It is not normally a binding court order by itself.
- [ ] Parenting plan or written summary
  A record of proposed arrangements for children, communication and future reviews.
- [ ] Consent order
  A legally drafted financial agreement submitted to the court for approval, usually with independent legal advice.

Ready to begin?

Book a confidential MIAM with Direct Mediation Services and we will explain the documents relevant to your circumstances.

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directmediationservices.co.uk