



## Principal Mediation Financial Agreement

Any financial agreement reached in mediation must be based upon comprehensive disclosure of both clients' financial situations. Without that disclosure, it will not be possible to turn the agreement into a legally binding document. However much it may be a nuisance, it must be done.

To provide financial disclosure please complete the financial details (Section 2) of Form E. The mediator will go through the forms with you both in mediation and draw up a comprehensive joint summary of the finances which have been disclosed in mediation. At the end of mediation, you will both be expected to sign that summary, confirming that the financial disclosure provided is complete.

**Please complete Section 2 of the FORM E, from page 4 up to the end of page 18.**

Pages 19 onwards do not need to be completed; the information covered by these pages will be managed in the mediation. You do not need to sign Form E; instead, you will sign the summary of the joint financial disclosure prepared by the mediator.

You will need to provide documentation to verify the disclosure provided. A list of the documents which may be needed is set out below. Please provide scanned copies of these documents

**When providing Form E and supporting documentation electronically, we ask for them to be submitted to us at least two full working days before the mediation appointment.**

The mediator will use the information provided in Section 2 of both your Form Es to prepare a working draft summary of the overall finances in the marriage. You may provide this summary and the Form Es to your solicitor to obtain advice on any disclosure issues and on appropriate settlement terms.

At the conclusion of mediation, the mediator will finalise the summary of financial disclosure. You will both sign it to confirm that the disclosure you provided in mediation is complete.



## Documents that you may need to verify disclosure

- Valuation(s) of the family home obtained within the last six months
- The most recent mortgage statement and redemption statement
- Valuations of any other property, land or buildings within the last six months, and the most recent mortgage statement or redemption statement
- Statements of all banks or building society accounts for the last 12 months
  - or passbook if no statements available.
- Statements of any cash holdings, PEPs or ISAs
- Statements of any stocks, shares, investment accounts.
- Surrender value quotations of any insurance policies with value such as endowment policies.
- Written evidence of all debts e.g. credit cards, loans, interest free purchases etc.
- Details of all pensions including the Cash Equivalent Transfer Value (CETV) for each pension
  - Details to be provided on Form P, as completed by the pension provider
- If you are self-employed or have an interest in a business or are in partnership, accounts for the last two years
- Tax returns for the past two years
- If you are employed, your last three payslips and your most recent P60
- Any other documentation that you or the mediator may think relevant for your financial situation.