ark mediation

Financial disclosure checklist

Financial mediation depends on both of you giving a full and honest picture of your finances. Use this checklist to gather your documents before your sessions. Tick each item as you collect it.

Income

Last 3 months' payslips and latest P60	
Self-employed: last 2 years' accounts and tax returns	
Benefits, tax credits and Universal Credit statements	
Rental, dividend or other income	

Property

Mortgage statement (current balance)	
Up-to-date valuation or estate agent appraisals	
Other property: deeds, mortgages, rental income	

Savings and investments

Last 12 months' bank statements for every account	
Savings, ISAs, shares, premium bonds, crypto	
Business interests and company accounts	

Pensions

Cash Equivalent Transfer Value (CETV) for every pension	
State pension forecast	

Debts and liabilities

Loans, credit cards, overdrafts and car finance	
Tax owed and other liabilities	

Outgoings and needs

Monthly budget for you and the children	
Childcare and school costs	
Future housing needs (rent or borrowing capacity)	

This checklist is general information and not legal advice. Your mediator will prepare an Open Financial Statement from your disclosure. Book a free 10-minute call with Ark Mediation on 0330 043 6360.