SAMPLE QUESTIONS TO BE ANSWERED

(Note: These sample questions are meant only for reference and to help generate ideas as some of the questions or issues may not be relevant in your case.)

1. How and when do we separate?
2. How will we address **cash flow – short term and longer term**?
3. How will we handle the **children's expenses**?
4. How will we handle payment for private school/college?
5. How will we cover **health insurance for the children, for each of us**? How will we pay for **uninsured medical expenses** for each of us and the children?
6. **Where will we each live**?
7. What will we do with **home now and in the future**?
   a. Who will live in the home? For how long?
   b. Who will own the home? For how long?
   c. How will the home value be handled?
   d. How will home expenses be handled?
8. Allocation of assets:
   a. What will we do with **investment accounts**?
   b. What will we do with **retirement accounts**?
   c. How will we handle **deferred compensation, restricted stock, performance shares/units**, etc.
   d. What will we do with **cash and bank checking and savings accounts**?
   e. What will we do with the **cars**?
   f. What will we do with **personal property**? Is there anything in a **safe deposit box**?
   g. How will we handle **private LLC investments, business/partnership interests**?
   h. How will we handle **frequent flyer miles, hotel points**, etc.?
9. Are there other assets that we need to discuss and decide how to handle, e.g., **inheritance, gifts, severance**?
10. Is there any **non-marital property not dealt with elsewhere** that we need to discuss? If so, then how will we handle?
11. What will be the **date on which we separate our finances or divide assets**?
12. How will we handle **life insurance** (will we keep current policies, for how long, who will be beneficiaries/trustees)? **Long-term care insurance**? **Disability**?
13. How will we handle **estate planning**?
14. How will we handle **tax issues** (filing, issues associated with child dependency exemption, real estate interest deduction, potential capital gains on the residence or

other issues related to house (e.g., escrow), payment of taxes due, any tax refunds, liability for audits of past joint returns or taxes not filed/due?

15. How will we handle **credit cards, debts**?
16. What will we do with **pets**? (ownership, expenses, physical caring)
17. How will we pay **Collaborative Process costs**?