



Dr. Randall L. Kinnison

Divorce and Family
Business
Eldercare and Estate

*Creating
Peace
on
Earth*

12725 SW Millikan Way, Ste 300
Beaverton, OR 97005
Phone: 503.352.9447
Fax: 503.419.4158
randy@genesismediation.com
www.genesismediation.com

Documents Needed for Verification

As your mediator, I need to see these papers to verify income, assets and liabilities. You will need these documents to file with the courts. I will release them back to you after submission. I do not need originals. Copies are sufficient.

INCOME:

- ✓ Pay stub or Form 1040 (first page only). Include Schedule C if self-employed.

AUTOS, MOTORCYCLES, RECREATION EQUIPMENT, ANYTHING WITH A VIN NUMBER AND REGISTRATION

- ✓ Registration papers.

BANKING

- ✓ Last statement that includes all accounts.

INVESTMENTS

- ✓ Brokerage account or financial institution statement.
- ✓ Stocks, bonds, limited partnerships, etc.
- ✓ Real estate, time shares, partnerships (including family holdings).

RETIREMENT

- ✓ IRAs, 401(k) last statement.
- ✓ Pension, PERS, or other similar retirement statements.

AIR MILES OR REWARD POINTS

- ✓ Statement reflecting current balance on air miles or reward points.

MORTGAGE AND HELOC

- ✓ Last statement including current balance.

CREDIT CARDS

- ✓ Principle on card and last statement.

STUDENT LOANS

- ✓ Last statement including current balance.

PERSONAL NOTES (INCLUDING FAMILY LOANS)

- ✓ Copy of the original note.
- ✓ Current balance and payment schedule.

LIFE INSURANCE

- ✓ Statement with policy number, death benefit and listed beneficiary. This is often the front page of the policy papers.

ANY FINANCIAL PAPERS REFLECTING ASSETS OR LIABILITIES.