

## CONFLICT WELLNESS AND LEGAL HEALTH CHECK-UP

**We are dedicated to not only solving your disputes, but also ensuring your on-going legal health and conflict wellness. Like a legal thermometer, this check-up helps you assess your current legal health so that we can work as a team to prevent or minimize trouble in your life. Please take a few minutes to complete this confidential check-up.**

**Date:** \_\_\_\_\_

**Name:** \_\_\_\_\_

1. Do you have a will which has been revised within the past three years? Yes  No
2. Do you currently have any concerns about your job or business? Yes  No
3. Do you have adequate life insurance protection? Yes  No
4. Do you have adequate medical insurance? Yes  No
5. Do you presently have a written and current listing of all important future dates concerning your legal and financial matters? Yes  No
6. Do you have a file, stored in a secure and fireproof location, containing all important documents (wills, titles, securities, contracts, marriage, divorce papers, deeds, pension plans, profit sharing plans, etc.)? Yes  No
7. Within the last three years have you reviewed the beneficiary designations on insurance policies, pension plans, bank accounts and other important documents? Yes  No
8. Do you have a complete and current personal financial statement which lists in detail all of your personal assets and liabilities? Yes  No
9. Do you currently have a monthly budget, which details your current income and all expenses? Yes  No
10. Do you have any concerns about your debts? Yes  No
11. Do you have a complete and current inventory of all your physical possessions sufficient to support a claim in the event of a loss? Yes  No

(-OVER-)

12. Do you have concerns about the academic, emotional, or social development of your child(ren)? Yes  No
13. Are there currently extraordinary emotional pressures and stresses in your life? Yes  No
14. After reviewing these questions, are there any matters or issues which you believe should be updated, reconsidered or brought to the attention of your mediator? Please explain below. Yes  No
15. Have any of these questions caused you to consider taking some action or making some further review? Please explain below. Yes  No
16. Is there an other legal, financial, or personal concern which you believe should be brought to the attention of your mediator? Please explain below. Yes  No

**On the lines below, please expand on any answers which you believe would give your mediator a better picture of your current legal health.**

---

---

---

---

---

Mediator's Notes:

---

---

---

---

---

---

---

---