

# Client Decision Checklist

The following client decision list is intended to suggest some (not all) issues to be considered

## Children Decisions

### Parenting Options

- Sole custody and decision making by one parent
- Joint decision-making, but residence primarily with one parent
- Split residence and decision making
- Which decisions need mutual consent/discussion?

### Access or Visitation?

- Weekdays/Weekends
- Holidays and long weekends
- School recesses
- Summer vacations
- Birthdays – Parents & children
- Other special occasions
- Telephone calls
- Notice of changes
- Expenses of missed times

### Geographic Restriction

- Foreign travel
- Relocation with the children

### Access to Records

- Doctors, dentists, etc.
- Schools and teachers

### Notification of

- Addresses and phone numbers

- Illnesses and accidents
- Children's whereabouts

## Grandparent Visitation

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## Support Decisions

### Child Support

- Amount
- Date of payment
- Cost of Living Adjustments
- Amount or reduction on emancipation of one child

### Definition of Emancipation

- Age
- College
- Marriage
- Living away from home
- Employment

### Extra Expenses

- College or private school Tuition
- Child care costs
- Summer camp/activities
- Extracurricular activities

### Medical

- Insurance coverage
- Procedures for claims filing and reimbursement
- Payment for uncovered expenses
- Decisions on elective procedures, including orthodontia
- Dental, prescription, eyeglasses, psychotherapy expenses

### Life Insurance

- Amount
- Duration
- Type

- Beneficiary
- Trustee for children
- Amount of cash value

## Alimony

- Amount
- Cost of living adjustment
- Time of payment
- Duration

## Health Insurance/COBRA Rights

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## Equitable Distribution

### Real Estate (House or Apartment)

- If marital home is sold, who occupies until sale?
- Who pays expenses until sale on:
- Mortgage, taxes, utilities, insurance, repairs

### Sale of House

- When?
- Age or graduation of children, remarriage or cohabitation
- Selling price: How to be determined?
- Option to buy
- Expenses of sale
- Division of proceeds
- Capital gains exposure

### If marital home to be retained by one person:

- Who remains in house
- Valuation of home
- Division of value: lump sum and/or payout

### Business Interests

- Method of valuation
- Division of value: lump sum and/or payout

### Retirement Funds

- Valuation
- Division of value: lump sum and/or payout

## Division of Personal Property

- Bank accounts and liquid assets
- Stocks, bonds, tax shelters
- Cars
- Jewelry
- Collectibles
- Household furniture
- Family photographs

## Other Issues

### Estate Waivers

- Effects of waivers
- Provisions for children of this marriage

### Tax Returns

- Liability or refunds on past returns
- Future filings
- Child Dependency Exemptions

### Costs of Divorce

- How to divide legal costs, filing fees and expert witness fees, including accountants, appraisers, etc.