

# WHAT TO BRING TO YOUR FIRST INTERVIEW

At O'Farrell Robertson McMahon we aim to be able to provide you at your first interview with a good understanding of what would be an appropriate agreement to reach at settlement of your family law issues and advise you on the best way to go about achieving that settlement.

Often this advice will need to be based on estimates of the value of some of your assets as it might be necessary to obtain more information or valuations before having an accurate idea of what things are worth. However, for most people we can give a good estimate of what would be an appropriate settlement even based on "given estimates".

Please use this list as a prompt for the information that would be useful for you to bring to your first interview. Do not be concerned if you are unable to obtain this information before the interview as we will then be able to discuss with you how we can assist you in gathering that.

Type of Asset	Information that would be useful	✓
<b>Your Home</b>	<ul style="list-style-type: none"><li>• Most recent rate notice</li><li>• Your opinion of what your home would be worth</li><li>• Agent's opinion of value of your home</li><li>• Any previous valuations of the property</li><li>• Current mortgage balance</li><li>• An estimate of how much you would be able to borrow if you had to refinance the property</li><li>• Copy of the Title for the home</li><li>• Copy of contract when you purchased the home</li></ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Other Real Estate</b>	<ul style="list-style-type: none"><li>• Same information as for "Your Home"</li></ul>	<input type="checkbox"/>
<b>Shares</b>	<ul style="list-style-type: none"><li>• Number of shares owned</li><li>• Any amount owed on the shares</li><li>• Current value of the shares</li></ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>Bank and Investment Accounts</b>	<ul style="list-style-type: none"><li>• Balance of bank accounts at date of separation</li><li>• Current balance of bank accounts</li></ul>	<input type="checkbox"/> <input type="checkbox"/>
<b>Motor Vehicles</b>	<ul style="list-style-type: none"><li>• Make and model of each motor vehicle</li><li>• Value of car obtained from a car dealer or "Redbook" value from the internet</li></ul>	<input type="checkbox"/> <input type="checkbox"/>

Type of Asset	Information that would be useful	✓
Jewellery	<ul style="list-style-type: none"> <li>Approximate value or valuation</li> </ul>	<input type="checkbox"/>
Caravans/Boats, etc.	<ul style="list-style-type: none"> <li>Approximate value or valuation</li> </ul>	<input type="checkbox"/>
Taxation	<ul style="list-style-type: none"> <li>Your personal tax returns for past 3 years</li> </ul>	<input type="checkbox"/>
Business/Partnership	<ul style="list-style-type: none"> <li>Tax returns for past 3 years</li> <li>Last 4 Business Activity Statements</li> <li>Last 3 Profit and Loss Statements</li> <li>Your opinion of value of plant and equipment of the business</li> </ul>	<input type="checkbox"/>
Family Trusts	<ul style="list-style-type: none"> <li>Trust Deed</li> <li>Trust tax returns for past 3 years</li> </ul>	<input type="checkbox"/>
Marriage Certificate	<ul style="list-style-type: none"> <li>Marriage Certificate</li> </ul>	<input type="checkbox"/>
Birth Certificate	<ul style="list-style-type: none"> <li>Your children's Birth Certificates</li> </ul>	<input type="checkbox"/>
Superannuation	<ul style="list-style-type: none"> <li>Any superannuation statements you have from about the time your relationship commenced</li> <li>Your most recent super statements</li> <li>Your spouse's most recent super statements</li> </ul>	<input type="checkbox"/>
Life Insurance	<ul style="list-style-type: none"> <li>Copy of any Life Insurance policies</li> </ul>	<input type="checkbox"/>
Pre-relationship Assets	<ul style="list-style-type: none"> <li>A list of all the assets and debts you and your spouse each had at the commencement of the relationship and the approximate value at that time</li> </ul>	<input type="checkbox"/>
Past Assets/Income	<ul style="list-style-type: none"> <li>Details (including any relevant documents) regarding any amounts received during the relationship, including compensation, gifts, inheritances or other lump sum payments</li> </ul>	<input type="checkbox"/>

