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**CONFIDENTIAL SETTLEMENT CONFERENCE MEMORANDA**

**DO NOT FILE THIS DOCUMENT**

**THE COMPLETED DOCUMENT IS TO BE PRESENTED ONLY  
TO THE  
SETTLEMENT CONFERENCE JUDGE *PRO TEMPORE***

1 Name: \_\_\_\_\_  
2 Mailing Address: \_\_\_\_\_  
3 City, State, Zip Code:  
4 Daytime Phone Number:  
5 Evening Phone Number:

6 **IN THE SUPERIOR COURT OF THE STATE OF ARIZONA**  
7 **IN AND FOR THE COUNTY OF MARICOPA**

8 \_\_\_\_\_  
9 Petitioner,  
10 and  
11 \_\_\_\_\_  
12 Respondent.  
13  
14

Case No.: \_\_\_\_\_

**CONFIDENTIAL SETTLEMENT  
CONFERENCE MEMORANDA OF:  
PETITIONER or RESPONDENT**

(Assigned to the Honorable  
\_\_\_\_\_)

15  
16 **I. BACKGROUND**

- 17 1. Date of Marriage: \_\_\_\_\_  
18 2. Minor children's names and ages:  
19 \_\_\_\_\_  
20 \_\_\_\_\_  
21 3. When was Petition was filed? \_\_\_\_\_  
22 4. When was Petition served? \_\_\_\_\_  
23 5. Are any temporary orders in place? \_\_\_ If so, attach a copy of the order.  
24 6. Is there an Order of Protection? \_\_\_ If so, attach a copy of the order.  
25 7. Are there agreements on any matters? \_\_\_ If so, state what they are.  
26

1 **II. ISSUES IN DISPUTE**

2 **A. Legal Decision Making and Parenting Time**

3 1. How should the parties make legal decisions regarding the children's  
4 medical, education, and religious matters. \_\_\_\_\_

5 \_\_\_\_\_

6 2. What is your specific proposal regarding regular parenting time?

7 \_\_\_\_\_

8 \_\_\_\_\_

9 3. What is your specific proposal regarding how holidays should be  
10 divided? Please be as specific as possible. \_\_\_\_\_

11 \_\_\_\_\_

12 **B. Real Property**

13 For each piece of real property state the address, the amount of any  
14 outstanding balance on the mortgage, the fair market value of the residence, and your  
15 proposal for whom should be awarded the home, or if it should be sold.

16 Address: \_\_\_\_\_

17 Mortgage Balance: \_\_\_\_\_

18 Fair Market Value: \_\_\_\_\_

19 Award to: \_\_\_\_\_ Property should be Sold: Yes \_\_\_ No \_\_\_

20 **C. Personal Property**

21 1. Vehicles:

22 For each vehicle provide the year and model of the vehicle, the  
23 amount of any outstanding principal balance on the loan, the fair market value of the  
24 vehicle, and your proposal for whom should be awarded the home, or if it should be sold.

25 Model: \_\_\_\_\_ Year: \_\_\_\_\_ Loan Balance: \_\_\_\_\_

26 Market Value: \_\_\_\_\_ Award to: \_\_\_\_\_

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Model: \_\_\_\_\_ Year: \_\_\_\_\_ Loan Balance: \_\_\_\_\_

Market Value: \_\_\_\_\_ Award to: \_\_\_\_\_

2. Personal Property in former residence: If you and your spouse can resolve personal property division state same. If not, state each and every item of personal property which may be in dispute and your proposal for who should be awarded same. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**D. Businesses**

List each and every business in which either party has an interest. Provide information regarding whether that interest is held by the community or if it is sole and separate. Provide information regarding any and all assets of the business, including real estate and bank accounts, as well as any and all debts owed by the business. Provide a profit and loss statement as an exhibit to this memorandum. State your proposal regarding who should be awarded the business, and what equalization should be paid based upon the value of same. \_\_\_\_\_

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**E. Bank Accounts/Investment Accounts/College Savings Accounts**

List each and every bank account/investment account/college savings account titled in the parties' names jointly or in either party's name alone. State how the account is titled, when it was opened, the balance in the account as of the date of service, and the most recent balance prior to ADR. State your proposal for how each of these accounts should be divided, who should be awarded same, or whether they should be closed.

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**G. Debts**

State the nature of the debt, the date incurred, the balance owed as of the date of service, the most recent balance prior to the settlement conference, and your proposal regarding how the debt should be divided. For example:

1. Credit card debts: \_\_\_\_\_

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2. Student Loans: \_\_\_\_\_

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**H. Debts Owed To the Community**

If there are any debts owed to the community, state the nature of the debt owed, when it occurred, how much is still owed, whether there is a promissory note, and if so attach a copy of same as an exhibit to your memorandum. State your proposal regarding how the repayment of this debt should be divided between the parties.

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**I. Retirement**

For each and every retirement account state the kind of retirement account it is, the balance as of the date of service, the most recent balance prior to the mediation, and your proposal regarding how the account should be divided. For example:

- 1. IRAs: \_\_\_\_\_  
\_\_\_\_\_
- 2. 401(k)'s: \_\_\_\_\_  
\_\_\_\_\_
- 3. Pensions: \_\_\_\_\_  
\_\_\_\_\_
- 4. Stock options: \_\_\_\_\_  
\_\_\_\_\_

**J. Life Insurance**

State each life insurance held for either party, whether the policy is term or whole life, whether there is a cash value, the death benefit and your proposal regarding who should be awarded the policy. \_\_\_\_\_  
\_\_\_\_\_

**K. Spousal Maintenance**

State whether either party is entitled to an award of spousal maintenance and the basis for same. State the amount and duration of spousal maintenance requested. If you do not believe spousal maintenance is appropriate state your basis for same.

Provide a copy of each party's Affidavit of Financial Information as an exhibit to this memorandum.

Award to: \_\_\_\_\_ Basis: \_\_\_\_\_  
\_\_\_\_\_

Amount: \_\_\_\_\_ Duration: \_\_\_\_\_

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**L. Child Support**

State what each party's income is and on what you base this position.

Provide a copy of a **child support worksheet** demonstrating your position regarding child support.

Mother's Income: \_\_\_\_\_ Based on: \_\_\_\_\_

Father's Income: \_\_\_\_\_ Based on: \_\_\_\_\_

State who should provide and pay for health insurance for the parties' minor children. \_\_\_\_\_

How should uncovered medical and agreed upon extra-curricular activities for the children be divided between the parties? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

How should any tax dependency/exemptions should be divided between the parties? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**M. Taxes**

How should any tax liability/refund be divided? \_\_\_\_\_

\_\_\_\_\_

Should the parties file joint or separate tax returns for year end, if applicable.

Joint: \_\_\_\_\_ Separate: \_\_\_\_\_

**N. Attorney's Fees**

How should attorney's fees be divided between the parties. \_\_\_\_\_

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**M. Disclosure and Discovery**

All necessary disclosure relating to pending issues has been completed and no discovery remains outstanding.

**RESPECTFULLY SUBMITTED** this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

\_\_\_\_\_  
Petitioner/Respondent Signature

**ORIGINAL** of the foregoing  
emailed/delivered this \_\_\_\_\_ day of  
\_\_\_\_\_ 20\_\_\_\_ to:

Judge Pro Tem

\_\_\_\_\_