

Family Law Intake

This form helps me understand your case before we meet and gives you a structured inventory of the issues that will matter on the day. It is written for counsel, but a party who is representing himself or herself may complete it directly.

Answer as briefly as you can and skip anything that does not apply. If a question deserves a longer answer or additional material, use the space provided or attach separately. Save this PDF when you are finished and return it to katie@kbwpllc.com.

If you have prepared a position statement or a sworn inventory, attach it separately. You do not need to repeat it here.

CONFIDENTIALITY

Everything I receive before the mediation is strictly confidential and is not shared with the other side without your specific permission. That includes every answer on this form, and in particular the safety questions below.

If you have not already done so, please email any mediation-related court order to katie@kbwpllc.com.

THE CASE

Cause number *(n/a if not yet filed)*

County

Court *(for example, 301st District Court)*

Name of judge *(n/a if needed)*

Type of case

You are (or represent) the

Represented by counsel?

Scheduled mediation date

How the mediation arose

Final trial date *(n/a if none set)*

Are temporary orders in place?

If yes, summarize the temporary orders (possession, support, exclusive use, injunctions):

FAMILY LAW INTAKE · CONTINUED

PARTIES AND COUNSEL

Used for my conflict check and for the pre-mediation calls. Not shared with the other side.

Petitioner

Respondent

Opposing counsel and firm *(or n/a if self-represented)*

Opposing counsel email and phone

CHILDREN

Are children involved in this case?

List each child by initials only.

INITIALS	AGE	CURRENTLY RESIDES WITH	SCHOOL OR SPECIAL NEEDS
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Describe the current possession schedule and any disputed conservatorship or possession issues (rights and duties, geographic restriction, holidays, decision-making):

Child support and medical or dental support: current amounts, requested amounts, and any arrearage:

FAMILY LAW INTAKE · CONTINUED

PROPERTY AND DEBTS

Have sworn inventories been exchanged?

Summarize the community estate (residence, retirement accounts, businesses, vehicles, bank accounts) and its approximate value:

Separate property claims, reimbursement claims, or disputed characterization:

Debts and who is asking to be responsible for each:

Is spousal maintenance or contractual alimony requested?

If yes, amount, duration, and the basis for the request:

SAFETY

Your answers here are seen by me alone and shape how I structure the session. They are never repeated to the other side.

Is there a protective order in place, or a history of family violence?

Do you want separate rooms with no joint session?

Anything else I should know before the parties are in the same building or on the same call:

FAMILY LAW INTAKE · CONTINUED

NEGOTIATION HISTORY

Offers or proposed decrees exchanged so far, with dates if you have them:

Has this matter been mediated before?

If yes, what has changed since then?

ATTENDEES

Everyone from your side who will attend, including any support person. Not shared with the other side.

NAME ATTENDING	ROLE	CELL PHONE	EMAIL
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OTHER INFORMATION

The two or three issues most likely to decide whether this case settles:

Any other information relevant to this mediation:

FAMILY LAW INTAKE · CONTINUED

SESSION LOGISTICS

Preferred format

Interpreter, accessibility, audio-visual, childcare timing, or scheduling needs:

SUBMITTED BY

Name

Firm *(if any)*

Email

Date