

## **CLIENT DECISION LIST**

### ***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**

#### ***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**

#### ***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

##### **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.