



Syndicate Subscription Legal Plans

COLLABORATIVE MEDIATION **CONFIDENTIAL PARTY INTAKE QUESTIONNAIRE:**

EACH PARTY COMPLETES THIS FORM SEPARATELY. Your answers are shared only with the mediation team and will not be given to the other party without your permission. If you fear for your safety, call 911 and tell us privately.

CONFIDENTIAL. Mediation is a voluntary, private process in which a neutral mediator helps the parties reach their own agreement. The mediator does not take sides, does not represent any party, and does not decide the outcome. This questionnaire helps the mediation team prepare. If a question does not apply, write "N/A." If unknown, write "Unknown."

YOUR INFORMATION:

☐ Full Legal Name / Business Name: _____

Contact person & title (if business): _____ **Syndicate Plan Member ID:** _____

Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

Is it safe to contact you at the phone and email listed?

☐ Yes ☐ No

PART 1 — TYPE OF DISPUTE

1.1 Check all that apply:

☐ Divorce / legal separation

☐ Child custody & parenting plan

☐ Child or spousal support

☐ Division of property & debts

☐ Business partner / shareholder dispute

☐ Contract dispute

☐ Landlord / tenant

☐ Employment

☐ Estate / trust / inheritance

☐ Neighbor / property line

☐ Consumer / vendor

☐ Other

1.2 Briefly describe the dispute in your own words: _____

PART 2 — THE OTHER PARTY OR PARTIES

Name	Relationship to You	Phone / Email	Has a Lawyer? (name)



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2.1 Has the other party agreed to mediate? ☐ Yes ☐ No

2.2 Do you want us to contact the other party to invite them to mediate? ☐ Yes ☐ No

PART 3 — STATUS OF THE DISPUTE

3.1 Is there a court case or arbitration pending? ☐ Yes ☐ No

Court / County: _____ Case Number: _____

Did the court order or recommend mediation? Any deadline? ☐ Yes ☐ No

If yes, explain: _____

3.2 Have you tried mediation or settlement talks before? ☐ Yes ☐ No

If yes, explain: _____

3.3 Do you have your own lawyer or advisor? ☐ Yes ☐ No

If yes — name / phone: _____

PART 4 — ISSUES TO RESOLVE

Issue	Your Position	What You Think the Other Party Wants

4.1 What has already been agreed? _____

4.2 What matters most to you in reaching a resolution? _____

4.3 What could you accept or offer to reach agreement? _____

4.4 What do you see as the biggest obstacles? _____



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PART 5 — FAMILY MEDIATION & SAFETY

Mediation is not appropriate for every situation. Please answer honestly; your answers help us decide whether mediation is safe and how to structure it.

Children's Names	Age	Lives With

5.1 Has there been domestic violence, threats, or intimidation between the parties? ☐ Yes ☐ No

5.2 Is there a current or past restraining / protective order? ☐ Yes ☐ No

5.3 Are you afraid of the other party, or afraid to disagree with them? ☐ Yes ☐ No

5.4 Does the other party control the finances or information you need? ☐ Yes ☐ No

5.5 Preferred format:

☐ Joint session

☐ Separate rooms (mediator goes between)

☐ Separate video sessions

☐ Not sure

5.6 Have both parties exchanged full financial information? ☐ Yes ☐ No

PART 6 — BUSINESS MEDIATION

6.1 Business / entity involved: _____ Your ownership %: _____

6.2 Amount in dispute (estimate): \$ _____

6.3 Does an owners' agreement contain dispute-resolution terms? ☐ Yes ☐ No

If yes, explain: _____

6.4 Experts that may help the session:

☐ Neutral financial expert / valuation

☐ Retired judge / subject-matter lawyer

☐ Accountant

☐ None needed

6.5 Person(s) with authority to settle who will attend: _____

PART 7 — SCHEDULING & LOGISTICS

7.1 Session format:

☐ In person

☐ Video conference

☐ Either

7.2 Dates / times you are available: _____

7.3 Language / interpreter needs: _____ Accommodations: _____

7.4 Others attending with you (lawyer, support person): _____



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ACKNOWLEDGMENTS

Please check each item to confirm you understand.

- ☐ Mediation is voluntary, and I may end it at any time.
- ☐ The mediator is neutral, does not represent me or any other party, and will not give legal advice to either side.
- ☐ I have the right to consult my own lawyer before, during, and after mediation, including before signing any agreement.
- ☐ Mediation communications are confidential and generally cannot be used as evidence, except as the law allows.
- ☐ An agreement is binding only if it is put in writing and signed by the parties.

PART 8 — DOCUMENT CHECKLIST

Please provide copies of documents that will help the mediator understand the dispute. Check each item you are including.

- | | |
|--|---|
| ☐ Court papers / orders | ☐ Contracts / agreements |
| ☐ Financial statements / disclosures | ☐ Property / business valuations |
| ☐ Correspondence with the other party | ☐ Prior settlement proposals |
| ☐ Parenting schedule proposal | ☐ Your summary / timeline |

Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge, and that I am participating in mediation voluntarily. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of mediation.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Title (if business): _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.