MEDIATION AND DISPUTE RESOLUTION | WORKSHEET 2 OF 3

Mediation Disclosure Readiness Gate

A go, conditional-go or pause test for whether financial mediation can produce an informed result.

BEST USED WHEN	Use this before booking a final settlement session or signing minutes of settlement.

ALBERTA LEGAL CHECKPOINT

Mediation is most useful when participation is safe, the necessary facts are available and each person can make an informed choice. In Calgary, Alberta's Family Justice Strategy generally requires an attempt at appropriate dispute resolution before a family court application, subject to exemptions. Reaching a shared idea in mediation is not always the final step; precise written terms and legal advice can prevent a new dispute later.

Primary source: [Alberta: Family Justice Strategy]

PREPARED FOR ______________________ DATE ______________________

1 Complete what you know	2 Mark gaps and assumptions	3 Attach supporting records

THE PRACTICE LENS

Compromise is not informed if the number being divided is still a guess. We distinguish missing records that can be managed with a condition from gaps serious enough to pause the financial negotiation, while allowing suitable parenting or process issues to keep moving.

A CONCRETE EXAMPLE

The home appraisal is current, but the pension statement is missing and the business valuation is 18 months old. The parties might mediate a parenting schedule now and set a disclosure timetable, while postponing a final property package until the financial picture is reliable.

Readiness test

Use one row per issue and identify the source for every important number or date.

Area	Complete/partial/missing	What remains
Income		
Banking and investments		
Real estate and debt		
Pension and retirement		
Business and trust interests		
Exemption claims		
Tax and valuation advice		

Red flags

Tick completed items. Circle anything that needs a document, follow-up or legal advice.

- [ ] A material asset, debt or income source is described but not documented.
- [ ] Values are based on incompatible dates.
- [ ] One person controls records and has not produced them.
- [ ] A business, pension, trust or tax issue requires expert input.
- [ ] The proposal depends on financing that has not been confirmed.
- [ ] Urgency is being used to avoid reasonable review.

Choose the next step

Use short factual notes. If an answer is uncertain, write what would confirm it.

1. Can the missing issue be isolated while other topics proceed?
2. What exact record, valuation or answer would change readiness?
3. Should the session be used to design disclosure rather than settle?
4. Is an interim agreement possible without prejudicing the final result?
5. What must be reviewed before any settlement becomes binding?

BRING THIS TO YOUR CONSULTATION

You do not need every blank filled. Mark the three items that matter most, attach the records you relied on and use this handoff to identify the next decision.

STATUS	[ ] Ready to discuss [ ] Missing records [ ] Deadline or urgent issue
NEXT REAL DEADLINE	
RECORD OR ANSWER STILL NEEDED	
DECISION I NEED HELP WITH	

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