

Prepare for your consultation

Use the items that apply to your situation. Start with available records and a list of what is missing.

Current case papers

- ☐ Papers received, including any complaint, petition, or summons
- ☐ Complete current orders and later amendments
- ☐ Hearing notices and upcoming dates
- ☐ A short factual timeline

Financial information

- ☐ Income records and relevant tax returns you have
- ☐ Dated account and retirement statements
- ☐ Mortgage, ownership, debt, and recurring-expense records
- ☐ Any prenuptial or postnuptial agreement

Parenting information

- ☐ The current order and the applicable school calendar
- ☐ The regular routine and any proposed schedule change
- ☐ Complete relevant messages, with dates
- ☐ Specific exchange dates and transportation questions

My three questions

1. _____
2. _____
3. _____

Keep originals unchanged. Ask the firm how to share sensitive documents securely. This checklist is a preparation aid; it does not establish that a file is complete.

Build a financial-records inventory

Use categories and dates. Keep full account numbers and other identifying details off this worksheet.

Category	Record date / available?	Missing item or question
Income / tax records		
Bank / investment accounts		
Retirement accounts		
Home / mortgage		
Other property		
Debts / monthly expenses		
Business / variable pay		

Before discussing a home or other property

What ownership or contribution questions are disputed?

Which figures are documented, and which are estimates?

What transfer or financing questions need separate review?

Use records you can access appropriately. Mark estimates clearly. Ask which additional documents would be useful for your particular matter.

Map the holiday exchange questions

Read with the full current order, later amendments, and the school calendar. Use Parent A / Parent B; avoid names and case numbers.

Thanksgiving

Order provision / page: _____

Start date / time: _____ End date / time: _____

Parent / transportation / location reference: _____

Question to resolve: _____

Christmas Eve / Christmas Day

Order provision / page: _____

Start date / time: _____ End date / time: _____

Parent / transportation / location reference: _____

Question to resolve: _____

Winter break

Order provision / page: _____

Start date / time: _____ End date / time: _____

Parent / transportation / location reference: _____

Question to resolve: _____

Return to the regular schedule / another period

Order provision / page: _____

Start date / time: _____ End date / time: _____

Parent / transportation / location reference: _____

Question to resolve: _____

Check how holiday time interacts with the regular rotation. This worksheet does not allocate parenting time, interpret an order, amend an order, or file a court request.

Read the related guide: haquelegal.com/family-law/child-custody/holiday-parenting-time/