



MSA Preparation Checklist

A practical checklist for organizing agreement terms and open items.

Use this guide to organize your thoughts before mediation. Bring notes, documents, and questions - not final positions. The goal is to help both participants identify issues, clarify options, and prepare for a productive conversation.

This worksheet is for general educational and mediation-preparation purposes only. Mediation Pro Se is neutral and does not represent either party. This is not legal advice. Each participant may consult an independent attorney or tax/financial professional before signing any agreement.

Disclaimer: Mediation Pro Se provides neutral mediation services and does not represent either participant. The mediator does not provide legal advice, legal representation, tax advice, financial advice, or therapeutic services. Participants are encouraged to consult independent professionals, including an attorney, before signing any agreement or filing documents with the court.

Mediation Confidentiality Notice: California law generally treats mediation communications as confidential, subject to specific legal rules and exceptions. Participants should review any mediation confidentiality disclosures provided before mediation begins and consult an attorney with questions about how confidentiality may apply to their situation.



MSA Preparation Checklist

A Marital Settlement Agreement generally organizes the agreements needed to complete a divorce or legal separation. This checklist helps identify topics that may need to be addressed before an agreement is finalized.

Case and party information

	Party 1	Party 2
☐ Correct full legal names		
☐ Date of marriage		
☐ Date of separation		
☐ Current court orders		
☐ Whether both parties are self-represented or represented		
☐ County and case number		
☐ Addresses for notices		
☐ Independent review requested or completed		
☐ Date Divorce petition filed		
☐ Date response filed		

Financial disclosure status

California divorce cases generally require financial information to be exchanged. Confirm current court requirements and form instructions before submitting final paperwork.

Item	Completed? Date	Notes
Preliminary disclosures exchanged		
Income and Expense Declaration reviewed		
Assets and debts listed or updated		
Final disclosures completed or waived, if permitted		
Supporting documents exchanged		

Agreement topics

Topic	Terms to confirm	Open items
Child custody / parenting plan	Legal custody, physical schedule, exchanges, holidays, travel, communication.	
Child support	Guideline calculation, add-ons, healthcare, childcare, activity expenses.	
Spousal support	Amount, duration, reservation/termination, tax questions, modification language.	
Property division	Real estate, vehicles, accounts, personal property, business interests.	
Debt division	Credit cards, loans, tax debts, indemnity and payment deadlines.	
Retirement accounts	Account division, QDRO needs, survivor benefits, valuation dates.	
Taxes	Filing status, dependency claims, refunds/liabilities, carryforwards.	
Insurance	Health, life, auto, homeowner/renter policies.	

Implementation checklist

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| ☐ Payment deadlines stated clearly | ☐ Transfer deadlines stated clearly |
| ☐ Titles or deeds to be changed | ☐ Retirement division process identified |
| ☐ Tax professional consulted where needed | ☐ Mortgage refinance or sale timeline specified |
| ☐ Insurance changes scheduled | ☐ Bank account changes scheduled |
| ☐ Parenting calendar attached or described | ☐ Dispute-resolution process included |
| ☐ Signatures and notarization requirements confirmed | ☐ Court filing packet reviewed for completeness |

Final review questions

Question	Yes / No / Notes
Does each term say who does what and by when?	
Are dollar amounts, dates, and account names clear?	
Are all assets and debts addressed?	
Are child-related terms practical and specific?	
Are tax or retirement issues reviewed by the right professional?	
Are both participants signing voluntarily?	

For California self-help information and current form references, review the California Courts Self-Help Guide.

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