

# How to prepare for your first legal meeting



# Preparation is the key

---

During your first meeting with your lawyer, it's important that you walk away feeling confident and at ease with the process. Your lawyer is there to help you navigate through this difficult time, and the expert team at Leach Legal have put together several tips to help you get the most out of your initial meeting.

Although everybody's circumstances are different, there is some basic information that we need before clear Family law advice can be given. It is important that we know the full story, even if your separation or divorce is amicable.

The more of this information you have at hand, the more detailed and accurate advice we can give you, and the quicker your appointment will be. Without this information, sometimes a second meeting is needed before we can give proper advice. This in turn increases your legal costs which can be better spent elsewhere.





**We know it's not always easy to have all the answers or access to relevant documents. Don't worry – your meeting will still be worthwhile. We can advise you about how to obtain answers and/or documents.**

**Here are some common questions that would be helpful to think about in preparation for your first meeting:**

- ✓ The date you began living together, the date of your marriage, your date of separation and your date of divorce.
- ✓ What assets and superannuation each of you owned at the beginning of your relationship (either the date you started living together or if you didn't live together, the date of marriage), and any debts that each of you had at that time.
- ✓ Whether any substantial inheritances or gifts were received either prior to, during or after your relationship, as well as how much was received and what happened to it.
- ✓ A list of all assets you and your ex-partner currently own (ie: properties, shares, businesses, cash/savings, cars, superannuation) both jointly or individually, and their current value.
- ✓ A list of all current debts in your name, your ex-partner's name or jointly (ie: mortgages, personal loans, credit cards, tax debts, business debts), and the amounts owing.
- ✓ What each of you earn (usually gross taxable income).
- ✓ Details of any child support being paid.
- ✓ Details of any proposals made to you by your ex-partner.

## If you have any of the following documents, it would be helpful to bring them along to your meeting:

- ✓ Any emails/letters to and from your ex-partner or their lawyer about family law matters.
- ✓ Any previous legal documents, such as Financial Agreements or Court documents.
- ✓ If there is a family trust, a copy of the Trust Deed and the most recent Financial Statement. If you cannot find it, try to find out who is the appointer and trustee of the trust. Your accountant may be able to assist with this.
- ✓ If there are companies involved, find out the name(s) of the company and who the shareholders and directors are, and bring along the most recent Financial Statement. Your accountant may be able to assist with this.
- ✓ If there is a self-managed superannuation fund, a copy of the Trust Deed and the most recent Financial Statement. Again, your accountant will be able to assist with this.
- ✓ Any other documents you feel are relevant to assist us in understanding what the financial circumstances are.

## You might also consider the following:

- ✓ Ask two or three local real estate agents to provide you with a written market appraisal for any properties.
- ✓ Contact your bank and obtain an up-to-date balance of all accounts that you have access to, or print out current statements from your online banking account.
- ✓ Contact your superannuation fund and ask them to send you a current statement, or download a statement from your online account.
- ✓ If there are any car loans, contact the finance company or bank and ask them to provide you with a payout figure.
- ✓ If you do not have copies of your Tax Returns, contact your accountant or the ATO and ask them to send you copies of your last three returns.

**We look forward to helping you make your separation  
or divorce process as smooth as possible.**