Separation Checklist

A Step-by-Step Guide
to Getting Organized

Feeling overwhelmed? That's completely normal.
This checklist breaks the process into manageable steps
so you can feel prepared and in control.

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How to Use This Checklist

Separation involves a lot of moving parts, and it's easy to feel like you don't know where to start. This checklist is designed to break things down into manageable steps so you can work through them at your own pace.

You don't need to do everything at once. Start with what feels most urgent, and work through the rest as you're ready. If you're working with a mediator or lawyer, they'll help guide you through many of these items.

1 Immediate Priorities

These are the things to think about first — especially in the early days.

- [ ] Ensure you and your children are safe
  If safety is a concern, contact VictimLink BC at 1-800-563-0808 (24/7)
- [ ] Take some time to process before making major decisions
  It's okay to pause. You don't have to figure everything out today.
- [ ] Identify a trusted support person you can talk to
  A friend, family member, counsellor, or therapist
- [ ] Secure important personal documents (passport, birth certificate, SIN card)
- [ ] Open a personal bank account if you don't already have one
- [ ] Change passwords on personal email and accounts
- [ ] Understand your immediate financial situation
  What income do you have access to? What are the essential monthly expenses?

TIP: Don't move money, close joint accounts, or change beneficiaries without legal advice first. These actions can create complications later.

2 Gather Your Financial Information

Having your financial picture organized makes mediation faster, smoother, and more productive.

Income

- [ ] Most recent 3 years of income tax returns (T1 General)
- [ ] Most recent 3 years of Notices of Assessment from CRA

- [ ] Recent pay stubs (last 3 months)
- [ ] If self-employed: business financial statements and corporate tax returns

Assets

- [ ] Bank account statements (chequing, savings — last 3 months)
- [ ] Investment account statements (RRSPs, TFSAs, non-registered)
- [ ] Pension statements and most recent annual statement
- [ ] Current property assessment or recent appraisal for real estate
- [ ] Vehicle registrations and estimated values
- [ ] Life insurance policies (including cash surrender values)
- [ ] Any other significant assets (business interests, inheritance, collections)

Debts

- [ ] Mortgage statements (current balance, lender, maturity date)
- [ ] Credit card statements (all cards, last 3 months)
- [ ] Line of credit statements
- [ ] Car loans or leases
- [ ] Student loans or other debts

Monthly Expenses

- [ ] Prepare a list of your current monthly expenses
  Housing, utilities, groceries, transportation, childcare, insurance, etc.

> **TIP:** Gather what you can. If you can't find something, make a note of it — your mediator can help you figure out how to get it.

3 Family & Parenting Information

If you have children, these items will help with parenting discussions during mediation.

- [ ] Children's full names and dates of birth

- [ ] Current living arrangements and daily routines
- [ ] School and childcare information
- [ ] Children's medical needs, activities, and special considerations
- [ ] Any existing parenting arrangements (formal or informal)
- [ ] Think about what parenting schedule might work for your family
  You don't need a perfect plan — just start thinking about what's realistic
- [ ] Consider your children's needs at each stage of development
- [ ] List important dates: holidays, birthdays, school breaks, special traditions

> **TIP:** The Parenting After Separation course is free for BC parents and highly recommended. Visit parenting-after-separation.jibc.ca to enroll.

4 Legal & Relationship Documents

Locate these documents if you have them — they'll be helpful for your mediator or lawyer.

- [ ] Marriage certificate (if formally married)
- [ ] Any existing prenuptial, postnuptial, or cohabitation agreement
- [ ] Date of marriage or when you began living together
- [ ] Date of separation
- [ ] Current wills and powers of attorney
- [ ] Any existing court orders related to your family
- [ ] Any prior separation agreements

5 Build Your Support Team

You don't have to do this alone. Consider bringing these people into your corner.

- [ ] Mediator — to guide the resolution process
  Book a free 15-minute call at cflm.ca to see if we're a good fit
- [ ] Independent lawyer — for legal advice on your agreement
  Your mediator can suggest options if you need a referral

- [ ] Therapist or counsellor — for emotional support during the transition
- [ ] Financial advisor — especially for complex financial situations
- [ ] Accountant — for tax implications of property division and support
- [ ] Trusted friend or family member — someone who can just listen

6 Take Care of Yourself

This one is easy to skip — but it matters more than you think.

- [ ] Be patient with yourself — this is a process, not a race
- [ ] Maintain routines where you can (sleep, meals, exercise)
- [ ] Limit big decisions in the first few weeks if possible
- [ ] Lean on your support people — that's what they're there for
- [ ] Remember: separation is a turning point, not an ending
  With the right support, this can be the start of a positive new chapter.

My Notes & Questions

Use this space to jot down questions for your mediator or anything else on your mind.

Ready to Take the Next Step?

A free 15-minute introductory call is the easiest way to find out if mediation is right for you. No preparation needed, no obligation — just a conversation.

Book your free call: cflm.cliogrow.com/book

Call us: 250-940-2197 | Visit: www.cflm.ca

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