



ONTARIO FAMILY MEDIATION TOOLKIT

Cost planning, preparation, financial disclosure and parenting

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Ontario Family Mediation Cost Planner

Use this worksheet with the online estimator to compare editable assumptions. It is a planning aid, not a quote or prediction.

Start with scope

Write the issues that actually need professional time. Parenting, support, property, disclosure, business valuation and drafting create different cost profiles.

1. Mediation assumptions

Cost item	Assumption	Estimated cost
Mediator joint-session hours	_____ hours x \$ _____ / hour	\$ _____
Mediator intake, screening and preparation	_____ hours x \$ _____ / hour	\$ _____
Mediator summary or drafting	_____ hours x \$ _____ / hour	\$ _____
Independent lawyer review - participant 1	_____ hours x \$ _____ / hour	\$ _____
Independent lawyer review - participant 2	_____ hours x \$ _____ / hour	\$ _____
Neutral financial or valuation professional	Estimated fee	\$ _____
Other disbursements and technology	Estimated fee	\$ _____
Estimated HST where applicable	Professional fees x 13%	\$ _____
MEDIATION SCENARIO TOTAL		\$ _____

Litigation Scenario Worksheet

This side does not estimate a legal outcome or average Ontario case. Enter assumptions supplied by the professionals you consult.

Cost item	Assumption	Estimated cost
Lawyer time - participant 1	_____ hours x \$_____ / hour	\$_____
Lawyer time - participant 2	_____ hours x \$_____ / hour	\$_____
Court preparation and document work	Included above or separate	\$_____
Financial expert, valuator or assessor	Estimated fee	\$_____
Transcripts, service, filing and disbursements	Estimated fee	\$_____
Potential cost-award exposure	Do not guess - obtain legal advice	\$_____
Estimated HST where applicable	Professional fees x 13%	\$_____
LITIGATION SCENARIO TOTAL		\$_____

Questions before relying on either total

- ☐ Does the estimate include both participants' professional costs?
- ☐ Are intake, safety screening, preparation, drafting, cancellations and HST included?
- ☐ Is financial disclosure complete enough to estimate the work required?
- ☐ Could a focused mediation resolve some issues even if another process handles the rest?
- ☐ Does the scenario include independent legal advice before final settlement?
- ☐ What events could increase the estimate - urgent motions, missing records, experts, trial or appeal?
- ☐ What work can the participants complete themselves without compromising accuracy or safety?

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Family Mediation Preparation Checklist

A practical Ontario checklist for intake, disclosure, legal advice and a focused first negotiation session.

Before choosing a mediator

- ☐ Confirm family-specific mediation credentials and current professional standing.
- ☐ Ask about separate family-violence and power-imbalance screening.
- ☐ Confirm hourly fees, retainers, HST, cancellations, preparation and drafting charges.
- ☐ Ask what written document the mediator provides and what lawyers must review.
- ☐ Discuss language, disability, privacy, scheduling, virtual and support-person needs.
- ☐ Identify any urgent court date, safety concern, preservation issue or limitation period.

Define the issues

- ☐ Parenting time and exchange logistics.
- ☐ Decision-making responsibility and information sharing.
- ☐ Child support and special or extraordinary expenses.
- ☐ Spousal support entitlement, amount, duration and review.
- ☐ Property, home, pensions, businesses, debts and tax consequences.
- ☐ Temporary arrangements that cannot wait for a final agreement.

Prepare the Information

Efficient mediation depends on reliable records and a clear agenda, not simply more meeting time.

Documents and professional input

- ☐ Exchange complete income, asset and debt disclosure through an agreed secure method.
- ☐ List missing documents, questions and deadlines in writing.
- ☐ Obtain appraisals, pension values, business valuations or tax advice where needed.
- ☐ Speak with an independent family lawyer about rights, risks and settlement structure.
- ☐ Prepare a current budget and realistic housing or refinancing information.
- ☐ Bring existing agreements, court orders and relevant correspondence.

For each mediation session

- ☐ Write the two or three decisions you want to address.
- ☐ Prepare a proposal and the reasons it may work for the family.
- ☐ Identify information needed before you can make an informed decision.
- ☐ Plan breaks, separate rooms or another safeguard discussed during screening.
- ☐ Use a private location, charged device and reliable connection for virtual mediation.
- ☐ Do not sign final terms before obtaining the agreed independent review.

After the session

- ☐ Read the mediator's summary and identify errors or unresolved points promptly.
- ☐ Complete assigned disclosure or professional follow-up by the deadline.
- ☐ Have each lawyer review proposed final terms independently.
- ☐ Convert any understanding into the legally appropriate document.
- ☐ Record annual disclosure, adjustment and dispute-resolution procedures.

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Ontario Financial Disclosure Checklist

Use this organizer for family mediation involving child support, spousal support, property, debt or the family home.

Income records

- ☐ Personal income tax returns for the most recent three years.
- ☐ Notices of assessment and reassessment for the most recent three years.
- ☐ Current pay statements and employment contract or compensation summary.
- ☐ Bonus, commission, overtime, tip, pension and benefit information.
- ☐ Employment Insurance, disability, workers' compensation or social-benefit records.
- ☐ Rental, investment, trust, partnership and foreign-income information.

Banking, investments and registered plans

- ☐ Current statements for every bank and credit-union account.
- ☐ Investment, brokerage, cryptocurrency and stock-plan statements.
- ☐ RRSP, RRIF, TFSA, RESP and other registered-plan statements.
- ☐ Historical statements for relevant marriage and separation dates.
- ☐ Records supporting a claimed gift, inheritance or other exclusion.

Property, Business and Debt

Confirm the relevant valuation dates and obtain professional valuations where ordinary statements are not enough.

Real estate and personal property

- ☐ Deeds, parcel registers, purchase and sale documents.
- ☐ Current mortgage, line-of-credit and property-tax statements.
- ☐ Appraisals or agreed valuation instructions.
- ☐ Condominium fees, insurance, repair and carrying-cost information.
- ☐ Vehicle, valuable collection and significant personal-property values.

Pensions and businesses

- ☐ Pension statements and Ontario Family Law Value documents where required.
- ☐ Corporate financial statements and tax returns for the relevant years.
- ☐ Shareholder agreements, ownership records and corporate minute-book information.
- ☐ General ledgers, shareholder-loan accounts and personal expenses paid by a business.
- ☐ Partnership, professional-practice, trust and valuation reports.

Debts and obligations

- ☐ Credit-card, loan, mortgage and line-of-credit statements.
- ☐ Tax balances, guarantees, judgments and family loans.
- ☐ Statements showing balances at marriage and separation where relevant.
- ☐ Documents showing who is legally liable to the creditor.

Support and Expense Information

Use current figures and identify tax credits, insurance, subsidies and reimbursements before allocating expenses.

Child and spousal support

- ☐ Actual annual parenting schedule and number of eligible children.
- ☐ Childcare invoices and related tax information.
- ☐ Uninsured health, dental, therapy and accessibility expenses.
- ☐ Education, post-secondary and extraordinary activity costs.
- ☐ Current budgets, housing costs and debt payments.
- ☐ Existing support orders, agreements, arrears and FRO statements.

Disclosure log

For every request, record the document, relevant date range, person responsible, delivery method, deadline and whether the item has been verified.

Final review

- ☐ Material changes have been disclosed before final settlement.
- ☐ Valuation reports use the correct dates and assumptions.
- ☐ A lawyer has advised whether disclosure is legally sufficient.
- ☐ Tax, pension, corporate and mortgage implementation has been reviewed.
- ☐ The agreement includes future income disclosure and support-adjustment dates.

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Ontario Parenting Mediation Checklist

Use this child-focused organizer to turn broad parenting intentions into clear daily, holiday and decision-making arrangements.

Ordinary parenting schedule

- ☐ School-week, weekend and overnight schedule.
- ☐ Exact exchange times, locations and transportation responsibility.
- ☐ Childcare, before-school and after-school arrangements.
- ☐ Plan for illness, school closure, weather and parent delay.
- ☐ Contact with the other parent during longer periods.
- ☐ Age-appropriate review dates as the child's needs change.

Holidays, vacations and travel

- ☐ Priority between holiday and ordinary schedules.
- ☐ Religious, cultural, family and school-break arrangements.
- ☐ Vacation notice, itinerary and emergency-contact information.
- ☐ Passports, consent letters and international travel.
- ☐ Transportation costs and missed-time arrangements.

Decisions and Information

A complete plan identifies both who decides and how reliable information moves between homes.

Major decisions

- ☐ Education, school changes and special supports.
- ☐ Non-emergency health, dental, therapy and medication decisions.
- ☐ Culture, language, religion and significant activities.
- ☐ Passports, travel and relocation proposals.
- ☐ Consultation steps, response deadlines and tie-breaking process.

Information sharing

- ☐ School, health and activity portals accessible to both parents.
- ☐ One agreed channel for routine parenting communication.
- ☐ Response expectations and emergency contact method.
- ☐ Receipts and approval process for child-related expenses.
- ☐ No child carries money, legal papers or hostile messages.

Daily practical details

- ☐ Clothing, school materials, medication and comfort items.
- ☐ Devices, online accounts, parental controls and location sharing.
- ☐ Activity registration, attendance and transportation.
- ☐ Authorized school and childcare pickups.
- ☐ Notice of address, phone, work and emergency-contact changes.

Safety, Change and Dispute Resolution

A parenting plan must respond to the actual family. Ordinary cooperative clauses may be unsafe or unworkable where coercion or violence is present.

Safety and participation

- ☐ Each participant completed separate safety and power-imbalance screening.
- ☐ Existing bail, restraining, child-protection or court terms were disclosed.
- ☐ Exchange and communication safeguards are specific and practical.
- ☐ The child is not asked to choose, negotiate or report on the other parent.
- ☐ Urgent and emergency procedures are clearly identified.

Review and future disagreements

- ☐ Annual or developmental review date.
- ☐ Process for work changes, school transitions and proposed moves.
- ☐ Written discussion before mediation where safe and appropriate.
- ☐ When parenting coordination, arbitration, legal advice or court may be needed.
- ☐ Method for recording agreed changes.

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