

Valuation Mediation Process Overview

Note: there does not have to be multiple meetings after the second meeting. The valuator could have enough information and the couple could agree and be finished with the process.

01 Get in contact

A divorcing couple will contact a valuator directly or go through an attorney who will contact a valuator. The valuator may be working for spouses as a couple or one of the spouses individually.

03 Schedule a joint call & start process

In a phone call, discuss with the couple if they have hired an attorney or separate attorneys. If attorneys are already hired, they will need to get involved at this point. Confirm that the couple is willing to move forward with this process.

Once confirmed, the valuator will send an engagement letter and create a shared portal for the clients and their attorneys (and anyone else involved) to access documents.

An official document request sheet will be sent.

05 Second meeting

The valuator will probably need to send a second document request after the first meeting. By the second meeting, the valuator should have access to more info. This meeting will start to answer questions and focus on the main topics/issues from the previous meeting.

The valuator and clients can start planning future meetings.

Tip: always plan two meetings ahead so if the next meeting is canceled, there is backup already scheduled.

07 Final meeting and presentation of number

In the final meeting(s), the valuator will present the number based on all previous information. The valuator has correlated an income approach and a market approach to determine the number.

The whole process could be finished here. The valuator may present a one-page document that supports their number.

If either side of the couple disagrees or has additional questions, the valuator may suggest to have private meetings to explain the reasoning behind the number.



02 Initial docs sent to prospective client(s)

Before the official process starts, the valuator will send their CV, preliminary one-pager, and a document request sheet. The couple will then decide if they want to move forward with the process.

04 Initial meeting (after data review)

This meeting should happen about 2 weeks after the joint phone call. The valuator should have enough historical data to populate a few spreadsheets.

Here is the time for all parties to ask questions:
 -Do we have enough info?
 -Is the data clear?
 -Are there consistencies within the data?

The clients may want to include their accountant at this point to help answer questions.

06 Third/fourth/fifth meetings

Now the valuator will start discussing potential adjustments. The valuator may present supporting documentation from a third-party to support his/her advice.

Conversations and meetings will continue to happen until the couple can agree on a number.