

Buyout Preparation Checklist

Organize your assumptions before discussing a support buyout with your advisers.

Define the payment schedule

- ☐ Record the monthly amount, payment count, and first payment date.
- ☐ Note any planned changes in payment amounts, timing, or duration. Identify exceptional installments and record each explanation and supporting source.

Document the calculation assumptions

- ☐ Record the valuation date, annual discount rate, and source for that rate.
- ☐ Keep a copy of the calculation showing its timing and compounding convention.

Gather the relevant materials

- ☐ Locate the applicable order or agreement and any amendments for your own review.
- ☐ List the documents your adviser may need; use their approved process to share them.

Identify questions for separate review

- ☐ Ask how termination, modification, taxes, and collection risk affect the discussion.
- ☐ Ask what rights or obligations a proposed buyout would release or preserve.

Prepare for the next conversation

- ☐ Write down the alternatives you want compared and any dates that matter.
- ☐ Confirm the professional review's scope, deliverables, timing, and fees.

This checklist is a preparation aid, not legal or tax advice or a settlement recommendation. A calculator values the payment assumptions entered; it does not determine a support award or an appropriate buyout.

Request a professional review

Visit the professional services page at SupportBuyout.com