

Confidential Client Questionnaire**** This information is required in order to assist you in resolving your family matters ****

Introductory Matters

1. How did you hear about our firm?	
2. Briefly describe the issues you are coming to see us about	
3. Have you or your family ever used our firm for assistance in the past?	

YouFull Legal Name: _____
(first) (middle) (last)Name on birth certificate: _____
(first) (middle) (last)Telephone: Home: _____ Work: _____
Cell: _____ Other: _____

Email Address: _____

Home Address: _____

Can we send mail to your home address? YES NO

If not, provide alternate mailing address: _____

How long have you lived in your current province of residence? _____

Date of Birth: _____ Place of Birth: _____
City and Province

Have you spoken with another lawyer? YES NO If so, name: _____

Are you living in the matrimonial home? YES NO Does the other party live with you? YES NO

How many adults live in your house? _____ How many children live in your house? _____

Do you have a will? YES NO

Your Employment

Occupation: _____

Name / Address of your Employment: _____

How long have you worked there? _____

Gross Annual Income: _____ Full-Time Part-Time

Other Sources of Income: _____

Other Party (your partner)Full Legal Name: _____
(first) (middle) (last)Name on birth certificate: _____
(first) (middle) (last)Telephone: Home: _____ Work: _____
Cell: _____ Other: _____

Email Address: _____

Home Address: _____

Can we send mail to their home address? YES NO

If not, provide alternate mailing address: _____

How long have they lived in their current province of residence? _____

Date of Birth: _____ Place of Birth: _____
City and Province

Have they spoken with a lawyer? YES NO If so, name: _____

Their Employment

Occupation: _____

Name / Address of their Employment: _____

How long have they worked there? _____

Gross Annual Income: _____ Full-Time Part-Time

Other Sources of Income: _____

The Relationship

Date started living together: _____

Date of Marriage: _____

Place of Marriage: _____
(City, Province, Country)

____ Check here if no children

ChildrenList any children of the relationship (your children biologically with the other party)

	Full Legal Name (on birth certificate)	Birthdate	Age at Dec 31 st <u>this</u> calendar year	Child Has Passport Yes/No
1.				
2.				
3.				
4.				

List any biological or step-children children outside the relationship (not with the other party)

	Full Legal Name (on birth certificate)	Birthdate	Biological Parents	Where is the child living?
1.				
2.				
3.				
4.				

Is health insurance available? Dental: YES NO Medical: YES NO

Which parent provides this insurance? _____ You _____ Other Party _____ Both

LIST OF PROPERTY

When entering into a pre-nuptial agreement, it is important to list all of the assets and debts that you currently have in order to ensure that both parties are entering the agreement with full information about what they are agreeing to. Please be as thorough as you can about the assets and debts that you list as well as their current values. If you do not have all of this information, please complete as much as you can and we will discuss at your consultation.

REAL ESTATE		
MATRIMONIAL HOME Address: Legal Description:	Current Market Value: <u>Mortgage Details</u> Balance #1: _____ Lender: _____ Balance #2: _____ Lender: _____	Who owns the home? <input type="checkbox"/> You <input type="checkbox"/> Other Party <input type="checkbox"/> Joint with Other Party <input type="checkbox"/> Other: _____ Date of Purchase: _____ Who is living there now? _____ Date of Appraisal: _____
OTHER REAL ESTATE Address: Legal Description:	Current Market Value: <u>Mortgage Details</u> Balance #1: _____ Lender: _____ Balance #2: _____ Lender: _____	Who owns the property? <input type="checkbox"/> You <input type="checkbox"/> Other Party <input type="checkbox"/> Joint with Other Party <input type="checkbox"/> Other: _____ Date of Purchase: _____ Who is living there now? _____ Date of Appraisal: _____
OTHER REAL ESTATE Address: Legal Description:	Current Market Value: <u>Mortgage Details</u> Balance #1: _____ Lender: _____	Who owns the property? <input type="checkbox"/> You <input type="checkbox"/> Other Party <input type="checkbox"/> Joint with Other Party <input type="checkbox"/> Other: _____ Date of Purchase: _____

	Balance #2: _____	Who is living there now? _____
	Lender: _____	Date of Appraisal: _____

Additional details about real estate properties:

BANK ACCOUNTS (chequing, savings, TFSAs, etc.)

You:	Chequing / Savings	Balance:	Institution:
	Chequing / Savings	Balance:	Institution:
	Chequing / Savings	Balance:	Institution:
Other Party:	Chequing / Savings	Balance:	Institution:
	Chequing / Savings	Balance:	Institution:
	Chequing / Savings	Balance:	Institution:
Joint:	Chequing / Savings	Balance:	Institution:
	Chequing / Savings	Balance:	Institution:
	Chequing / Savings	Balance:	Institution:

CASH HELD OUTSIDE OF A FINANCIAL INSTITUTION

You:		Location:
Other Party:		Location:

EDUCATION SAVINGS PLANS (for your children)

Name of Child		Balance:		Institution:
Name of Child		Balance:		Institution:
Name of Child		Balance:		Institution:
Name of Child		Balance:		Institution:

REGISTERED PENSION PLANS

You:	Balance:		Company: ___ Currently Receiving Pension Income
Other Party:	Balance:		Company: ___ Currently Receiving Pension Income

RETIREMENT SAVINGS ACCOUNTS (RRSPs, LIRAs, etc.)

You:	Balance:		Institution: ___ Spousal
	Balance:		Institution: ___ Spousal
	Balance:		Institution: ___ Spousal

Other Party:	Balance:		Institution: __ Spousal
	Balance:		Institution: __ Spousal
	Balance:		Institution: __ Spousal

NON-REGISTERED INVESTMENTS

You:	Balance:		Institution:
	Balance:		Institution:
	Balance:		Institution:
Other Party:	Balance:		Institution:
	Balance:		Institution:
	Balance:		Institution:
Joint:	Balance:		Institution:
	Balance:		Institution:
	Balance:		Institution:

VEHICLES

Registered to You	Today's Value: Loan Balance:	Year/Make/Model: Financed By:
Registered to Other Party	Today's Value: Loan Balance:	Year/Make/Model: Financed By:
Registered in Joint Names:	Today's Value: Loan Balance:	Year/Make/Model: Financed By:

RECREATIONAL VEHICLES

ATV	Today's Value: Loan Balance:	Registered To: Year/Make/Model: Financed By:
Holiday Camper	Today's Value: Loan Balance:	Registered To: Year/Make/Model: Financed By:
Snowmobile	Today's Value: Loan Balance:	Registered To: Year/Make/Model: Financed By:
Boat	Today's Value: Loan Balance:	Registered To: Year/Make/Model: Financed By:
Other	Today's Value: Loan Balance:	Registered To: Year/Make/Model: Financed By:
Other	Today's Value: Loan Balance:	Registered To: Year/Make/Model: Financed By:

POINTS ACCOUNTS

You:	Account 1:	Organization:
	Account 2:	Organization:
Other Party:	Account 1:	Organization:

	Account 2:	Organization:
Joint:	Account 1:	Organization:
	Account 2:	Organization:

BUSINESS INTERESTS

You	Legal Name of Business: Operating Name of Business: Province of Registration: Owners: Value of Business:
	Legal Name of Business: Operating Name of Business: Province of Registration: Owners: Value of Business:
Other Party	Legal Name of Business: Operating Name of Business: Province of Registration: Owners: Value of Business:
	Legal Name of Business: Operating Name of Business: Province of Registration: Owners: Value of Business:
Joint	Legal Name of Business: Operating Name of Business: Province of Registration: Owners: Value of Business:
	Legal Name of Business: Operating Name of Business: Province of Registration: Owners: Value of Business:

LIFE INSURANCE POLICIES

You:	Institution: Type of Policy: ___ Whole Life ___ Term Life Beneficiaries: Cash Surrender Value:
	Institution: Type of Policy: ___ Whole Life ___ Term Life Beneficiaries: Cash Surrender Value:
Other Party:	Institution: Type of Policy: ___ Whole Life ___ Term Life Beneficiaries: Cash Surrender Value:
	Institution: Type of Policy: ___ Whole Life ___ Term Life Beneficiaries: Cash Surrender Value:

PERSONAL LOANS (not listed above – e.g. loans to/from family members, personal bank loans, etc.)

You:	Balance:		Purpose of Loan: Institution:
	Balance:		Purpose of Loan: Institution:
Other Party:	Balance:		Purpose of Loan: Institution:
	Balance:		Purpose of Loan: Institution:
Joint:	Balance:		Purpose of Loan: Institution:
	Balance:		Purpose of Loan: Institution:

CREDIT CARD DEBTS

You:	Visa MasterCard AMEX	Balance:	<input type="checkbox"/> Balance Paid Off Monthly <input type="checkbox"/> Other Party Has Supplementary Card
Other Party:	Visa MasterCard AMEX	Balance:	<input type="checkbox"/> Balance Paid Off Monthly <input type="checkbox"/> Other Party Has Supplementary Card

Please provide details of the following property:

1. Have you or the other party ever received any inheritances? YES NO
 If so, provide details: _____

2. Have you or the other party ever received any financial awards from the Court? YES NO
 If so, provide details: _____

3. Have you or the other party ever received any insurance proceeds? YES NO
 If so, provide details: _____

4. Do you or the other party have any collections, works of art, or other valuable property not listed above? YES NO
 If so, provide details: _____

5. Describe any major gifts you or the other party have received from a third party.

6. Is there any other property that you or the other party own that has not been listed above? YES NO
 If so, provide details: _____

Please return the following with this Questionnaire:

1. Copies of any written Agreements with the other party
2. Copies of any Court Orders respecting this or any other relationship
3. Details and Statements for Property Listed if available, including:
 - Real Estate appraisals / market assessments (realtor)
 - Bank Accounts
 - Registered Pension Plans
 - Retirement Savings Accounts
 - Non-Registered Investment Accounts
 - Vehicle and Recreational Vehicle Appraisals
 - Points Accounts
Details of any Business Interests (valuation, corporate search, shareholder registry, etc.)
 - Personal Loan Statements or Description of Outstanding Balance (vehicles, recreational vehicles, etc.)
 - Credit Card Statements
 - Financial Statements for any businesses owned by either party