

Date: \_\_\_\_\_

## **Confidential Client Questionnaire**

**\*\* This information is required in order to assist you in resolving your family matters \*\***

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### **You**

Full Name: \_\_\_\_\_  
(first) (middle) (last)

Name on your birth certificate: \_\_\_\_\_  
(first) (middle) (last)

Telephone: Home: \_\_\_\_\_ Work: \_\_\_\_\_

Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Social Insurance Number: \_\_\_\_\_

Home Address: \_\_\_\_\_  
(Street/Box) (City) (Province) (Postal Code)

Can we send mail to your home address? Yes / No (circle one)

If not, provide alternate mailing address:

\_\_\_\_\_  
(Street/Box) (City) (Province) (Postal Code)

How long have you lived in: Alberta \_\_\_\_\_ Saskatchewan \_\_\_\_\_ Other \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_  
(city) (province/country)

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 of your Employer / Business: \_\_\_\_\_

How long have you worked there? \_\_\_\_\_ months \_\_\_\_\_ years

Gross Annual Salary: \_\_\_\_\_ Wage: \_\_\_\_\_ Full-Time \_\_\_ Part-Time \_\_\_

## Other Party (*your ex*)

Full Name: \_\_\_\_\_  
(first) (middle) (last)

Name on their birth certificate: \_\_\_\_\_  
(first) (middle) (last)

Telephone: Home: \_\_\_\_\_ Work: \_\_\_\_\_  
Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Social Insurance Number: \_\_\_\_\_

Home Address: \_\_\_\_\_  
(Street/Box) (City) (Province) (Postal Code)

Where can we serve court documents on the other party?

\_\_\_\_\_  
(Street – not P.O. Box) (City) (Province) (Postal Code)

How long has the other party lived in that province? \_\_\_\_\_ months \_\_\_\_\_ years

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_  
(city) (province/country)

Are they living in the matrimonial home? YES NO

How many adults live in the other party's house? \_\_\_\_\_

How many children live in the other party's house? \_\_\_\_\_

## Other Party's Employment

Occupation: \_\_\_\_\_

Name of other party's Employer / Business: \_\_\_\_\_

How long have they worked there? \_\_\_\_\_ months \_\_\_\_\_ years

Gross Annual Salary: \_\_\_\_\_ Wage: \_\_\_\_\_ Full-Time \_\_\_ Part-Time \_\_\_

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## The Relationship

Province of last joint residence: Alberta \_\_\_ Saskatchewan \_\_\_ Other \_\_\_\_\_

Date started living together: \_\_\_\_\_

Date of Separation: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_

Place of Marriage: City \_\_\_\_\_ Province/Country \_\_\_\_\_

Marital Status prior to marriage:

You: Single \_\_\_ Divorced \_\_\_ Widowed \_\_\_

Other Party: Single \_\_\_ Divorced \_\_\_ Widowed \_\_\_

Why did you Separate? \_\_\_\_\_

Is there any possibility of reconciliation? YES NO

Have you or the other party attended counseling? YES NO

Have you or the other party started any Court proceedings? YES NO

Have you and the other party made any agreements? YES NO

If so: \_\_\_\_ verbal \_\_\_\_ written

Is spousal support being sought? YES – by me YES – by other party NO

**Assets / Debts**

Do you have a Will? YES NO

Do you have a Power of Attorney? YES NO

Do you have a Personal Directive? YES NO

Have you divided your household contents yet? YES NO

If yes, are you happy with the division? YES NO \*\* Provide details \*\*

Asset / Debt	Date Acquired	Market Value (today)	Details
<b>Real Estate</b>			
<b>Matrimonial Home</b>  Address:  Legal Description:		Current Market Value: \$  Mortgage Amount: (\$ )	Who owns the home? <input type="checkbox"/> You <input type="checkbox"/> Other Party <input type="checkbox"/> Joint with Other Party <input type="checkbox"/> Other: _____  Who is living there now? Mortgage Lender: Date of Appraisal:
<b>Other Land / Houses</b>  Address:  Legal Description:		Current Market Value: \$  Mortgage Amount: (\$ )	Who owns the home? <input type="checkbox"/> You <input type="checkbox"/> Other Party <input type="checkbox"/> Joint with Other Party <input type="checkbox"/> Other: _____  Mortgage Lender: Date of Appraisal:
<b>Other Land /Houses</b>  Address:  Legal Description:		Current Market Value: \$  Mortgage Amount: (\$ )	Who owns the home? <input type="checkbox"/> You <input type="checkbox"/> Other Party <input type="checkbox"/> Joint with Other Party <input type="checkbox"/> Other: _____  Mortgage Lender: Date of Appraisal:

Asset / Debt	Dates	Market Value (today)	Details
<b>Pension Plan</b>			
• You:	Dates of service:	\$	Pension Administrator:
• Other Party:	Dates of service:	\$	Pension Administrator:
<b>RRSPs</b>			
• You:	<b>Provide Statement</b>	\$	Institution:
	<b>Provide Statement</b>	\$	Institution:
• Other Party:	<b>Provide Statement</b>	\$	Institution:
	<b>Provide Statement</b>	\$	Institution:
<b>Bank Accounts</b>			
• You:	<b>Provide Statement</b>	\$	Institution:
• Other Party:	<b>Provide Statement</b>	\$	Institution:
• Joint:	<b>Provide Statement</b>	\$	Institution:
<b>Investments</b>			
• You:	<b>Provide Statement</b>	\$	Institution:
• Other Party:	<b>Provide Statement</b>	\$	Institution:
• Joint:	<b>Provide Statement</b>	\$	Institution:
<b>Vehicles</b>			
• You:		\$	Year/Make/Model: Loan Amount: Institution:
• Other Party:		\$	Year/Make/Model: Loan Amount: Institution:
• Joint:		\$	Year/Make/Model: Loan Amount: Institution:

Asset / Debt	Dates	Market Value (today)	Details
<b>Recreational Vehicles</b> (e.g. quads, snowmobiles, boats, etc.)			
• You:		\$ \$ \$	Year/Make/Model: Loan Amount: Institution:
• Other Party:		\$ \$ \$	Year/Make/Model: Loan Amount: Institution:
• Joint:		\$ \$ \$	Year/Make/Model: Loan Amount: Institution:
<b>Life Insurance Policies</b>			
• You:	<b>Provide Statement &amp; Policy</b>	\$	Type: Term / Life Institution: Cash Value:
• Other Party:	<b>Provide Statement &amp; Policy</b>	\$	Type: Term / Life Institution: Cash Value:
• Joint:	<b>Provide Statement &amp; Policy</b>	\$	Type: Term / Life Institution: Cash Value:
<b>Points Accounts (e.g. co-op memberships, Aeroplan, Air Miles, etc.)</b>			
• You:	<b>Provide Statement</b>		
• Other Party:	<b>Provide Statement</b>		
• Joint:	<b>Provide Statement</b>		
<b>Business Interests</b>			
• You:	<b>Provide Valuation</b>	\$	Business Name: Accountant: Shareholders:
• Other Party:	<b>Provide Valuation</b>	\$	Business Name: Accountant: Shareholders:
• Joint:	<b>Provide Valuation</b>	\$	Business Name: Accountant: Shareholders:

Asset / Debt	Date Acquired	Market Value (today)	Details
<b>Personal Loans</b>			
• You:	<b>Provide Statement</b>	(\$ )	Lender:
• Other Party:	<b>Provide Statement</b>	(\$ )	Lender:
• Joint:	<b>Provide Statement</b>	(\$ )	Lender:
<b>Credit Card Debts</b>			
• You:	<b>Provide Statement</b>	(\$ )	Institution:
• Other Party:	<b>Provide Statement</b>	(\$ )	Institution:
• Joint:	<b>Provide Statement</b>	(\$ )	Institution:
<b>Inheritances / Gifts</b>			
• You:		\$	Details:
• Other Party:		\$	Details:
<b>Property Owned at the Date of Marriage (AB) or the Date of Cohabitation (SK)</b>			
• You:		\$ \$ \$	Details:
• Other Party:		\$ \$ \$	Details:
<b>Financial Awards from Court / Insurance Proceeds</b>			
• You:	<b>Provide Paperwork</b>	\$	Details:
• Other Party:	<b>Provide Paperwork</b>	\$	Details:
<b>Other Property Not Listed Above:</b>			
• You:		\$	Details:
• Other Party:		\$	Details:

**Please return the following with this Questionnaire:**

1. Income Tax Return & Notice of Assessment – 3 most recent years
2. If you are an employee: 3 most recent pay stubs
3. If you own your own business: most recent financial statements
4. Recent photograph of the other party
5. Official marriage certificate (if available)
6. Agreements or Court Orders respecting this relationship
7. Recent appraisal for your home(s)
8. Most Recent Statements for your Mortgage(s), Loan(s), Line(s) of Credit, Credit Card(s), Bank Account(s), RRSP(s), Pension(s), Investment(s)