

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

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### Children

List any children of the relationship (biologically with the other party)

	Legal Name (first, middle, last)	Birthdate	Age	Passport? YES/NO	Living where? With whom?
1.					
2.					
3.					
4.					

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

	Legal Name (first, middle, last)	Birthdate	Age	Biological Parents	Living where? With whom?
1.					
2.					
3.					
4.					

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

Which parent provides this insurance? You \_\_\_\_ Other Party \_\_\_\_

Have you attended the Parenting After Separation course YES NO

### Parenting Plan:

What are the current living arrangements for the children?

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How much time do the Children spend with each parent?

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What is the current arrangement for financial support for the children?

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Does either parent object to these current arrangements? YES NO

If YES, how would either parent like to change the current arrangements?

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**Additional Children Information:**

1. Do you have health care costs for your children? YES NO Subsidized? YES NO

Details: \_\_\_\_\_

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How are these costs being paid? \_\_\_\_\_

2. Do you have any childcare costs for your children? YES NO

Details: \_\_\_\_\_

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How are these costs being paid? \_\_\_\_\_

3. Are your children in any extra-curricular activities? YES NO

(a) Child: \_\_\_\_\_

Activities: \_\_\_\_\_

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Cost: \_\_\_\_\_

(b) Child: \_\_\_\_\_

Activities: \_\_\_\_\_

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Cost: \_\_\_\_\_

(c) Child: \_\_\_\_\_

Activities: \_\_\_\_\_

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Cost: \_\_\_\_\_

(d) Child: \_\_\_\_\_

Activities: \_\_\_\_\_

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Cost: \_\_\_\_\_

How are these costs being paid? \_\_\_\_\_

4. If your children have any of the following expenses, please provide details, including how costs are being shared:

- orthodontics
  - counselling
  - physiotherapy
  - prescription medication
  - glasses / contacts
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5. Describe any government credits you are eligible to receive:

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6. Do you have any additional school expenses (i.e. tutors)? YES NO

Details: \_\_\_\_\_

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How are these costs being paid? \_\_\_\_\_

6. If you have any children in post-secondary education, please provide details, including how the costs are being shared:

Details: \_\_\_\_\_

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How are these costs being paid? \_\_\_\_\_



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. Recent photograph of the child(ren)
6. Official marriage certificate (if available)
7. Agreements or Court Orders respecting this relationship
8. Receipts for any expenses listed for the children
9. Recent appraisal for your home(s)
10. 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)