

New client information form:

Name:

Address:

Any restrictions on sending mail to this address?

If so, alternate mailing address:

Telephone numbers:

Work:

Home:

Cell:

Any restrictions on calling these numbers?

Email:

Name of other side:

Their relation to you:

Their address and telephone number:

Other lawyer:

Date of cohabitation:

Date of marriage:

Date of separation:

Children:

Name

sex

birthdate

other parent

living with:

Previous court proceedings (type and date, bring in court documents):

Previous Agreements (Marriage Contracts or Separation Agreements):

Please bring in.

What are the issues that you are most concerned about today?

Are there any safety concerns, or has there been any physical violence toward you or the children?

Are there any mental health, drug or alcohol concerns?

Are you still living in the family home?

Is the other party still living in the family home?

What plans are there for the family home?

Your job and annual income:

The other party's job and annual income:

Child support:

Is it being paid now?

Is it being claimed? If not, why?

Special expenses:

Child care?

Tuition?

Medical or dental insurance?

Medical expenses?

Tutoring?

Extracurricular activities?

Property and financial issues:

We will need to know the following (attached additional information if necessary):

What you had (assets and debts) on the date of marriage

What you had (assets and debts) on the date of separation

What you have (assets and debts) today.

Are there other financial issues in this case?

Please provide any documentation regarding:

House(s)

Other property

Furnishings and other valuable household contents

Vehicles

Collections

Pensions (government and private)

RRSPs

Bank accounts

Mutual funds, stocks, or other investments

Foreign bank accounts or property

Business owned by you or the other party

Money owed to you

Debts you owe, including:

Mortgage

Line of Credit

Loans

Credit cards

Did you inherit money?

Did you receive any large gift from friends or family, that was given solely to you and not your spouse?

Did you ever receive a personal injury settlement?

Please also provide the following:

Income tax returns and Notices of Assessment for the past 3 years

Most recent 3 pay stubs, and/or payments from pension, WSIB, social assistance, EI, etc.

Copies of recent household bills: mortgage, utilities, taxes, car payments, credit card bills, child care expenses

All of this information will be used to put together an accurate financial statement. Collecting, copying and organizing these documents yourself will save you legal fees, and allow me to complete your financial statement more quickly.

Speak to me if you do not believe that a financial statement is required in your particular case. It will not be necessary for Children's Aid cases, or in some cases where the only issue is custody or access. However, it will be required if financial issues if we are dealing with any financial issues.