DIVORCE & SEPARATION QUESTIONNAIRE

File #: ___________________________________ Date: _______________________

CLIENT INFORMATION:

Full name of client: ____

Address and postal code: ____

____

Telephone number: Business: ____________________ Residence: _____________________

Cellular: ______________________ Fax: ___________________________

Email: ____

Referral Source: ____

Surname before this marriage: ____

Marital status before this marriage: ____

Date of birth: ____

Place of birth: ____

Amount of time in Alberta: ____

SPOUSE INFORMATION:

Name of Spouse: ____

Address and postal code: ____

____

Telephone number: Business: _____________________ Residence: ___________________

Cellular: _______________________ Fax: _________________________

Email: ____

Spouse's lawyer: ____

Surname before this marriage: ____

Marital status before this marriage: ____

Date of birth: ____

Place of birth: ____

Amount of time in Alberta: ____

RELATIONSHIP/MARRIAGE INFORMATION

1. Date of marriage: ____________________
2. Place of marriage: ____________________
3. Start date of cohabitation: ____________________
4. Date of separation: ____________________
5. Start date of relationship: ____________________
6. Pre-Nuptial/Marriage Contract: ____________________

GROUNDS

☐ Separated

☐ Adultery: ____________________

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____

☐ Cruelty:____________________

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ATTEMPTS AT RECONCILIATION

7. Attempt at reconciliation: ____________________

____

____

8. Is reconciliation possible:____________________

____

I, ____________________, acknowledge that Mr. Reinhart has drawn my attention to the provisions of the act that would not object of dealing with reconciliation between spouses. I acknowledge that Mr. Reinhart has discussed with me the possibility of reconciliation and has informed me of all possible marriage and guidance counseling facilities currently available and known to him and has confirmed that he will provide me and search for the names of such guidance counseling facilities if I do so request.

____________________ ____________________

Client signature Date

CHILDREN OF MARRIAGE

9. Name Birthdates Age Grade University

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10. Existing care arrangements: ____

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11. Proposed care arrangements: ____

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12. Child care expenses: ____

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13. Medical/dental premiums: ____

14. Health expenses that exceed insurance (orthodontics, counseling, prescriptions, optometric, etc.): ____

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15. Special education expenses: ____

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____

16. Extracurricular activities: ____

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____

17. Child's contribution: ____

18. Subsidies/credits/tax deductions: ______________________________________

19. Bursaries/trust funds/scholarships: ______________________________________

CLIENT EMPLOYMENT INFORMATION

20. Education: ____

21. **Current Employment**:
    a. Name of employer: ______________________________________
    b. Address of employer: ______________________________________
    c. Job title: ______________________________________
    d. Total income declared on last tax return: ______________________
    e. Net taxable income declared on last tax return: ______________________
    f. Base salary: ______________________________________
    g. Bonuses: ______________________________________
    h. Benefits:
        i. Life insurance:

ii. Disability insurance: ____

iii. AHC: ____

iv. Extended health/dental: ____

v. Pension: ____

vi. Savings plan: ____

vii. Stock options: ____

viii. Car allowance/company car: ____

ix. Other: ____

i. Length of employment: ____

j. Future education/employment intentions: ____

____

22. **Previous Employment:**

a. Name of employer: ____

b. Address of employer: ____

c. Job title: ____

d. Total income declared on last tax return: ____

e. Net taxable income declared on last tax return: ____

f. Base salary:

____

g. Bonuses: ____

h. Benefits:

i. Life insurance: ____

ii. Disability insurance: ____

iii. AHC: ____

iv. Extended health/dental: ______________________________________

v. Pension: ____

vi. Savings plan: ____

vii. Stock options: ____

viii. Car allowance/company car: ___________________________________

ix. Other: ____

i. Length of employment: ____

23. Employment history: ____

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24. Resume: ____

SPOUSE'S EMPLOYMENT INFORMATION

25. Education: ____

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26. **<u>Current Employment:</u>**

a. Name of employer: ____

b. Address of employer: ____

c. Job title: ____

d. Total income declared on last tax return: ____________________________

e. Net taxable income declared on last tax return: ________________________

f. Base salary: ____

g. Bonuses: ____

h. Benefits:

   i. Life insurance: ____

   ii. Disability insurance: ______________________________________

   iii. AHC: ____

   iv. Extended health/dental: ___________________________________

   v. Pension: ____

   vi. Savings plan: ____

   vii. Stock options: ____

   viii. Car allowance/company car: _________________________________

   ix. Other: ____

i. Length of employment: ____

j. Future education/employment intentions: ________________________________

____

27. **<u>Previous Employment:</u>**

j. Name of employer: ____

k. Address of employer:____

l. Job title: ____

m. Total income declared on last tax return: ____________________________

n. Net taxable income declared on last tax return: ________________________

o. Base salary: ____

p. Bonuses: ____

q. Benefits:

   i. Life insurance: ____

   ii. Disability insurance: ______________________________________

   iii. AHC: ____

iv. Extended health/dental: ____

v. Pension: ____

vi. Savings plan: ____

vii. Stock options: ____

viii. Car allowance/company car: ______________________________________

ix. Other: ____

r. Length of employment: ____

28. Employment history: ____

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29. Resume: ____

PROPERTY

30. Matrimonial home: ____

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a. Amount owing: ____

31. Other real estate: ____

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32. Contents: ____

____

a. Specific items: ____

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____

33. Art, jewellery and stamps/bullion/coins: ___________________________

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____

34. Vehicle 1: __________________________ Vehicle 2: __________________________

Owner: __________________________ Owner: __________________________

FMV: __________________________ FMV: __________________________

Loan: __________________________ Loan: __________________________

Vehicle 3: ____________________ Vehicle 4: ____________________

Owner: ____________________ Owner: ____________________

FMV: ____________________ FMV: ____________________

Loan: ____________________ Loan: ____________________

35. Trailer/Motor Home: ____
    ____
    a. Amount owing: ____

36. Boat/aircraft: ____
    ____
    a. Amount owing: ____

37. Miscellaneous Equipment/Machinery: ____
    ____
    ____
    ____
    a. Amount owing: ____

38. Livestock: ____
    ____

39. Tools: ____
    ____

40. Bank accounts:
    a. Joint accounts: ____
       ____
       ____
    b. Husband's accounts: ____
       ____
       ____
    c. Wife's accounts: ____
       ____
       ____

41. Term deposits: ____
    ____

42. Rewards Points: ____
    ____

43. Life insurance: ____

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44. Stocks/bonds: ____

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45. Stock options: ____

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46. Pensions: ____

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47. RRSP's: ____

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48. CPP: ____

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49. Corporate interests: ____

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50. Business/partnership/joint venture: ____

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51. Mortgages/Agreements for Sale: ____

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52. Trusts: ____

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53. Assets held in trust for children: ____

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DEBTS

	JOINT	HUSBAND	WIFE
54. Credit cards			
55. Line of credit			
56. Bank loan			

57. Loan from third party			
58. Personal guarantee			
59. Income taxes			
60. Other			

PROPERTY EXEMPTIONS

	HUSBAND	WIFE
61. Gifts from third party		
62. Inheritance		
63. Property acquired before marriage		

64. Settlements (torts)		
65. Insurance		

CONSIDERATION FOR EXEMPTIONS

66. Contributions made by each spouse: ____

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67. Contributions of each spouse with regard to family, business or home: ________________

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68. When property was acquired during marriage: ____

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69. Income earning capacity: ____

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70. Obligations/ liabilities of each spouse at time of marriage: _____________________________

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71. Obligations/ liabilities of each spouse at time of separation: ___________________________

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72. Previous distributions: ____

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73. Third party gifts: ____

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74. Previous orders, tax liabilities, a dissipated property, any other relevant fact and circumstances: ____

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MISCELLANEOUS PROPERTY ISSUES

81. Gifts of assets since separation: ____

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82. Sale of assets since separation: ____

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83. Other dispositions since separation: ______________________________________

____

84. Debts acquired since separation: ____

____

85. Assets acquired since separation: ____

____

86. Will: ______ Yes ______ No

I, ________________________, have been told to change my will by my lawyer.

__________________________ __________________________

Signature Date

87. Previous distribution of property between client and spouse: ______________________

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88. Any written or oral agreement: ____

____

89. Any unusual circumstances re property (s. 8): ________________________________

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MISCELLANEOUS INFORMATION

75. Spousal Support: ____

76. Years of marriage: ____

77. Role of Husband in marriage: ____

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78. Role of Wife in marriage: ____

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79. Health issues of Husband: ____

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80. Health issues of Wife: ____

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81. Self- Sufficiency of children: ______ YES ____ NO

82. Lump sum: ____

90. Marriage certificate: ____

91. Spouse's photograph: ____

92. Best place for service: ____

93. Best time for service: ____

94. Mediation: ____

95. Fee quote: ____

CLIENT DOCUMENT CHECK LIST

✓	Document
☐	Marriage Certificate
☐	Photograph of Spouse
☐	Address and phone number of spouse
☐	Budget (retain receipts to "back up" expenses)
☐	Income Summary (client and spouse)
☐	Pay stubs for the last 3 months
☐	Employment contract/collective agreement
☐	Stock option agreement
☐	Documents to confirm previous exercise of options
☐	Tax returns for both parties for the last 5 years including T4's, T5's and Notices of Assessment and Reassessments
☐	Financial statements for all companies for the last 5 years
☐	Corporate tax returns for the last 5 years
☐	Corporate bank statements for the last 6 months (or more)
☐	Bank statements and cancelled cheques for the last 6 months or more
☐	Statements for GIC's, T-Bills, Term deposits and any other investment for the last 6 months
☐	RRSP statements for the last 6 months (or more)
☐	Brokerage statements for the last 6 months (or more)
☐	Certificate of Title for residence
☐	Appraisals for residence
☐	Current mortgage statement for residence
☐	Loan balance statements
☐	Personal Guarantees
☐	Loan applications
☐	Net worth statements
☐	Pleadings, Orders, etc. in any other court proceedings
☐	Pre-Nuptial or Settlement Agreement
☐	Resume
☐	Current Will

- Medical Reports