

KEMP PIRIE CROMBEEN - FAMILY LAW INTAKE FORM

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Date Form Given: _____ Date Form Received: _____

PLEASE COMPLETE THIS FORM FULLY.

We cannot advise you if you do not provide us with the information requested below.

CLIENT

1. Full Name: _____
2. Date of Birth: _____
3. Maiden name: _____
Place of Birth: _____
4. Street address of Client: _____
5. Mailing address of Client: _____
6. Phone numbers: Home: _____ Work: _____ Cell: _____
7. Email address: _____

Do you intend to sell the home, and move? If so, please provide your new address

If this changes after you retain our firm, please advise our office as soon as possible.

CLIENT'S ESTRANGED SPOUSE / FORMER PARTNER

8. Full Name: _____
9. Date of Birth: _____
10. Place of Birth: _____
11. SIN: _____
12. Street Address: _____
13. Mailing address: _____
14. Phone # - Home: _____ Work: _____ Cell: _____
15. Email: _____
16. Spouse/Partner's Workplace: _____
17. Workplace Street Address: _____
18. Workplace Mailing Address: _____
19. Name of Lawyer: _____
20. Directions to opposite parties residence: (i.e. – service)

Does your former partner intend to sell the home, and move? If so, please provide his/her new address.

If this changes after you have retained our firm, please update our office as soon as possible.

CURRENT PARTNER / SPOUSE

Full Name: _____ Date of Birth: _____

Address: _____

Employer: _____

If this changes after you have retained our firm, please update our office as soon as possible.

PREVIOUS LAWYERS (if applicable)

21. Client referred by: _____

22. Have you previously retained a lawyer? _____

23. If so, who? _____

24. Is that lawyer representing you at this time? _____

25. If not, why not. _____

HISTORY OF RELATIONSHIP

26. Date of marriage: _____

27. Periods of Cohabitation prior to marriage: _____

21. If not married date Cohabitation began: _____

22. Place of Marriage: _____

23. Date of Separation: _____

24. Periods of time during which parties were previously living separate and apart:
(if applicable, please specify exact dates)

25. Any periods of Reconciliation – Specify year and time frame.

26. Previous Marriages: _____

Date of Marriage: _____

Date of Separation: _____

27. Previous Divorces: _____

Date of Divorce: _____

Name of Other Party: _____

28. Name of Lawyer acting for you during the Divorce _____

CHILDREN (Biological / Adopted)

NAMES First, Middle, Surname	Birthdate	School, Grade	Residence & How long

28. Have the children moved back and forth at all? _____

Step Children Names	Birthdate	School, Grade	Residence & How Long

31. Have the children moved back and forth at all? _____

Additional Children	Date of Birth	School	Grade

34. Where do these children live? _____

35. Since when? _____

36. Have the children moved back and forth at all? _____

37. If the children are not living with you, are you able to exercise access to the children? State the current access arrangements. Have those access arrangements remained stable. If not, describe changes and why these have occurred. Do you wish to see further changes?

EDUCATION

38. Your Education: _____

39. Education of former partner: _____

EMPLOYMENT

40. Client's Work History – please provide the last 5 years
Please also specify any periods of unemployment.

Employer	Address	Date Started	Job Description	Gross Annual Income

41. If not employed, are you receiving Employment Insurance, Pensions, or other Income: (If so, please list and state when it began and in what amounts).

If your employment changes after you retain this office, please advise as soon as possible.

42. Is your former partner employed? Please provide information for the last 5 years. Please also specify any periods of unemployment.

Employer	Address	Date Started	Job Description	Gross Annual Income

43. Is Former partner living with someone else? (Name(s) if possible). Where?

44. What financial arrangements existed while living with the other party? Who paid the bills and how were expenses divided?

45. What financial assistance has been provided since the separation?

46. Are you making monthly payments for Child and / or Spousal Support? (please specify)

Who is Paying	To Whom	Amounts

IMMEDIATE CONCERNS & RESOLUTION PROPOSAL – What have you discussed with your former partner? If not, why? What are your immediate concerns? Please provide details of what you wish to see as a resolution.

Custody:

Access:

Child Support:

Spousal Support:

Exclusive Possession of Home:

Property Issues:

Debt Issues:

Expense Issues:

47. Do you wish to negotiate a settlement out of Court? Yes No

48. Have you discussed this with your former partner? If not, why?

48. In Custody matters, what arrangements do you believe are in the best interests of the children? Please state why. (Please specify)

49. If you are not currently obtaining access, what type of access are you looking for? (Please specify)

50. Do you have any medical issues that your lawyer or the Court should be aware of?

51. Medical issues concerning your spouse?

52. Medical issues concerning children?

CHILD & SPOUSAL SUPPORT

We need all income information for you and your spouse / partner for the past 3 years. This includes:

- 1. Tax Returns; from the previous 3 years;
- 2. All sources of income with current receipts of payment; and
- 3. All deductions from income with current statement.

If your employment changes, please advise our office as soon as possible, and provide updated payroll information.

PROPERTY, DEBT AND EQUALIZATION

We need these documents to draft a Separation Agreement or Court Documents:

ASSETS - THIS SECTION MUST BE COMPLETED

LIST all assets owned as of the date of separation. State what each asset may be worth as of the date of separation. State who owns the asset and who currently has possession of that asset. Indicate if the person currently in possession of that asset intends to keep that asset. If an asset was inherited, state who received the inheritance, from whom, and when.

REAL ESTATE:

List all homes, land and cottages in your name, your partner's name, or held jointly

- List the value of each property as of the date of separation.
- Please provide a statement showing the value (MPAC value / appraisal)

BANK ACCOUNTS:

List all accounts in your name, your partner's name or held jointly

- State the balance as of the date of separation
- Please provide a statement, as of the date of separation

RRSPs and RESPs:

List all RRSP's and RESP's in your name, your partner's name and any held jointly

- Please note who contributes to the RESPs or savings plans
- state the balance as of the date of separation
- Please provide a statement, as of the date of separation

OTHER INVESTMENTS AND SAVINGS (stocks, bonds, etc.):

List all other investments in your name, your partner's name and any held jointly

- state the balance as of the date of separation
- Please provide a statement, as of the date of separation

PENSIONS:

List all pensions in your name, your partner's name and any held jointly

- state the balance as of the date of separation
- Please provide a statement, as of the date of separation. You may have to obtain a formal valuation

CARS / TRUCKS:

List all vehicles in your name, your partner's name and any held jointly

- state the balance as of the date of separation
- please provide a black book or blue book value

OTHER MOTORIZED VEHICLES (boats, ATV, etc.):

List all other motorized vehicles in your name, your partner's name and any held jointly

- state the balance as of the date of separation
- please provide an estimated market value

TOOLS:

List all tools in your possession or your partner's possession

- state the market value as of the date of separation

JEWELLERY:

List all jewellery in your possession or your partner's possession

- state the market value as of the date of separation
- indicate if they were a gift

FURNITURE / HOUSEHOLD CONTENTS:

List all furniture / household contents in your possession or your partner's possession

- state the market value as of the date of separation

LIFE INSURANCE POLICIES:

List all life insurance policies, the institution and account number

- indicate if the policies are in your name or your partner's name
- indicate what the face amount value is of each policy
- state the cash surrender value as of the date of separation
- indicate who the beneficiary is on each policy

OTHER ASSETS:

List any other assets in your name, your partner's name or held jointly

- indicate what the value is as of the date of separation
- indicate who is in possession of the asset

DEBTS - THIS SECTION MUST BE COMPLETED

LIST all debts and the balance of each as of the date of separation. State whose name the debt is in and who is currently paying that debt. Indicate if the person currently paying for that debt intends to keep paying that debt. State the monthly payment.

MORTGAGE:

List the banking institution and account number

- indicate if the mortgage is in your name, your partner's name or held jointly
- state the balance owing as of the date of separation
- who is currently paying the mortgage and how much monthly
Please provide a statement, as of the date of separation

LINES OF CREDIT:

List all Lines of Credit, the banking institution and account number

- indicate if the LOC is in your name, your partner's name or held jointly
- state the balance owing as of the date of separation
- state who is currently paying the LOC and how much monthly
- Please provide a statement, as of the date of separation

CREDIT CARDS:

List all credit cards, the banking institution and account number

- indicate if the cards are in your name, your partners name or held jointly
- state the balance owing as of the date of separation
- state who is currently paying the credit cards and how much monthly
- Please provide a statement, as of the date of separation

VEHICLE LEASES OR LOANS:

List all vehicle leases or loans, the banking institution and account number

- indicate whether the lease is in your name, your partner's name or joint
- state the balance owing as of the date of separation
- who is currently paying the lease and how much monthly
- Please provide a statement, as of the date of separation

INCOME TAXES:

List all income tax owing

- indicate whether the tax owing is in your name or your partner's name
- state the balance owing as of the date of separation
- Please provide a statement, as of the date of separation

OTHER DEBTS:

List any other debts owing

- indicate whether the debt is in your name, your partner's or joint
- state the balance owing as of the date of separation
- who is currently paying the debt and how much monthly
- Please provide a statement, as of the date of separation

ARE THERE ANY OTHER ISSUES THAT WE NEED TO KNOW ABOUT

Please specify.