Before You See Your Family Law Practitioner

CHECKLIST

Disbursements are legal expenses that a lawyer passes on to a client, such as charges for photocopying, searching for documents, phone calls and messenger services.

When you meet with your family law practitioner you might try to assemble as much of this material as possible in order to save time and money by saving the cost of having your lawyer collect these materials.

<u>Make sure to keep copies of any documents you bring to the meeting for your own records.</u>

- **All personal information:**
  - Name, date of birth and current contact information (address, phone, email)
  - Photo ID – health card and/or driver's license
  - Your occupation
  - Your approximate gross income, Notice of Assessment if available
  - Your spouse's name and contact information
  - Your spouse's occupation
  - Your children's names, birth dates, etc.
  - Wills
  - SIN numbers
  - Passports / Citizenship cards

- **Details of your marriage:**
  - Date of marriage
  - Wife's maiden name
  - Existing agreements
    - Cohabitation agreement
    - Prenuptial agreement /marriage contract
    - Separation agreement
    - Custody or parenting agreements
    - Child and/or spousal support information
    - Sponsorship agreement
    - Other
  - Current living arrangements
    - Who is living in the matrimonial home?
    - Have you had marriage counseling? (supply details)
  - Prior marriages:
    - If so, do you have a copy of the certificate(s) of divorce?

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- **Litigation**
  - Have there been any prior court proceedings? (supply details)
  - Any court orders

- **All financial documents and papers:**
  - Any financial records for you and your spouse including:
    - Bank statements for all bank accounts
    - Income tax returns for the last 3 years
    - Pay stubs for the current year
    - Investment information (RRSPs, RIFs, Employer Pension Plan statements etc.)

- **All real estate and other property documents and papers:**
  - In whose name is the matrimonial home?
  - Has the home been assessed? Approximate value?
  - Any mortgages?
  - Produce any documents relating to other major personal assets such as the ownerships of cars, boats or other vehicles

- **Liabilities/Debts:**
  - Bring any outstanding debt documents and statements (loans, mortgages, other)

- **Other necessary information:**
  - Did you or your spouse have any assets (including money) at the date of the marriage?
  - Have you received an inheritance following the date of your marriage?
  - Have you received a substantial gift from anyone other than your spouse?
  - Do you have any monies from a personal injury claim?
  - Do you have a general life insurance policy?

- **Background:**
  - A summary of your story, including important dates

This tip sheet was prepared for CALC by Family Law Lawyer Sharon Leitch and Judith Dale, Hastings Law Association.