



The Village at Park Royal
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TODAYS DATE: _____

GENERAL CLIENT INFORMATION FORM

Your Information:

Full name (Given, middle and last name): _____

Date of Birth (DD/MM/YYYY): _____ Place of Birth: _____

Cell Phone Number: _____ / Can I contact you here? YES___/NO___

Alt Phone Number (if Appl): _____ / Can I contact you here? YES___/NO___

Email Address: _____ / Can I contact you here? YES___/NO___

Home Address and postal code: _____

Can correspondence be sent to your home address? YES___/NO___

If not, where? _____

Were you married before? YES___/NO___

Details of previous marriage (date of divorce/death of spouse) _____

Your surname before marriage: _____ Your surname at birth: _____

Do you wish to change your name: YES___/NO___

Spouse's Information:

Full name (Given, middle and last name): _____

Date of Birth (DD/MM/YYYY): _____ Place of Birth: _____

Cell Phone Number: _____

Email Address: _____

Home Address and postal code: _____

Were you married before? YES___/NO___

Details of previous marriage (date of divorce/death of spouse) _____

Surname before marriage: _____ Surname at birth: _____

Information on marriage or relationship:

Date of commencement of cohabitation: (DD/MM/YYYY) _____

Date of marriage: (DD/MM/YYYY) _____

Place of marriage: _____

Date of separation: _____

Has a 'Court' or 'Litigation' process been commenced: YES__ / NO__

If yes, is there a 'Hearing' or 'Trial' pending, and if so on what date(s) _____

Have you reconciled at any time? YES__ / NO__

Is there a possibility of reconciliation with your spouse? YES__ / NO__

Do you have a marriage certificate? YES__ / NO__

Children of the marriage/relationship (if applicable):

Information (first child):

Full Legal Name of the Child: _____

Date of Birth (DD/MM/YYYY) & Birthplace: _____

School Attending and Grade: _____ / _____

Extra-Curricular Activities: _____

Any Health or Other Concerns: _____

Child's Information (second child):

Full Legal Name of the Child: _____

Date of Birth (DD/MM/YYYY) & Birthplace: _____

School Attending and Grade: _____ / _____

Extra-Curricular Activities: _____

Any Health or Other Concerns: _____

[If more than 2 children please add additional details on a separate sheet]

If applicable, how were issues relating to parenting resolved to this stage?

(a) Ad hoc/nothing formal/requires resolution (circle appropriate answer)

(b) Trial Judgment pronounced on _____

(c) Consent Court Order pronounced _____

(d) Separation/Parenting Agreement dated _____

(please attach a copy of the document which established the parenting plan)

Are there any children from a prior or subsequent relationship? YES___/NO___

If so, what are the names, ages and birth dates of the children and of which party?

Do you or your spouse pay child support for any of these children? YES___/NO___

Does anyone apart from you or your spouse pay child support for these children? YES___/NO___

If yes, provide details: _____

Your Income/Employment):

Name of Employer or name of business? _____

Position Held: _____ Date of Commencement: _____

Schedule of employment: hours/days per week? _____

Gross Income per year? _____ Extended Health Benefits? _____

Other sources of income? (e.g. rental, dividends, disability, Government benefits, etc.)

Spouse's Income/Employment):

Name of Employer or name of business? _____

Position Held: _____ Date of Commencement: _____

Schedule of employment: hours/days per week? _____

Gross Income per year? _____ Extended Health Benefits? _____

Other sources of income? (e.g. rental, dividends, disability, Government benefits, etc.)

Information on Assets and Debts:

List assets owned by you, your spouse, or both of you jointly:

ASSETS

Real Estate (list full address) <ul style="list-style-type: none">• Include any residential/rental property	Value (approximate)	Date Purchased	Owned by Self / Spouse or Joint?
Vehicles/Boats/Trailers <ul style="list-style-type: none">• Make, Model and Year	Value (approximate)	Date Purchased	Owned by Self / Spouse or Joint?
Financial assets (include name of bank/ financial institution) <ul style="list-style-type: none">• List savings & chequing account, term deposits, GIC's, stocks, bonds, mutual funds, etc.	Type of Account	Balance	Owned by Self / Spouse or Joint?
Life Insurance Policy Provider	Account #	Death Benefit Payable or Cash Surrender Value?	Owned by Self / Spouse or Joint?
RRSP's/RIF's/TFSA etc. (include name of bank/financial institution)	Account #	Value (approximate)	Owned by Self / Spouse or Joint?

PENSION (company, union, CPP)	Account #	Estimated Value	Owned by Self / Spouse or Joint?

Business Interests	Value (approximate)	Owned by Self / Spouse or Joint?
Other	Amount (approximate)	Owned by Self / Spouse or Joint?

List any debts owed by you, your spouse, or both of you jointly:
Indicate who is responsible for the debt:

DEBTS

Secured debts (list bank/financial institution) • Mortgages/Lines of Credit	Amount (approximate)	Owned by Self / Spouse or Joint
Unsecured debts • Bank loans • Credit cards • Personal loans	Amount (approximate)	Owned by Self / Spouse or Joint

Do you or your spouse have any excluded property/assets: YES___/NO___

If yes, please describe:

Did you or your spouse receive an inheritance: YES___/NO___

If yes, please describe:

[please add additional details about assets/debts on a separate sheet if necessary]

Briefly add any other details which you feel are relevant to your situation:

Supplementary Questionnaire – Family Law

We have found in working with families that conflict or violence to some degree is very common. As a Family Dispute Resolution Professional, under the new *Family Law Act*, I am now mandated to inquire into the prevalence of family violence in order to better assist parties to a mediation going forward. For this reason I ask everyone we discuss these three important questions (the written answers for which can remain confidential):

- 1. *Have you ever had any concerns for your own safety or the safety of your children during the relationship?***
- 2. *Has your spouse ever caused you to feel threatened or fearful?***
- 3. *Do you believe there is an immediate risk of violence in your family, either to you or to your children?***

I am required by law to ask these questions of all parties/clients for a number of reasons, such as:

- **To assure the safety and well-being of family members;**
- **To assist potential victims to formulate a safety plan;**
- **To educate about the potential impact violence can have on a family' 4.**
To be able to refer you to appropriate services, and
- **To ensure that parenting plans and separation agreements are made in an environment free of coercion and intimidation.**

If the answer to any of the above noted three questions is answered in the affirmative:

- 1. *Who wants to end the relationship and why?***

- 2. *What concerns do you have about separating?***

3. How were decisions made in your relationship?

4. How do you and your spouse settle disputes when you don't agree?

5. Are there any restraining orders or no contact orders? YES__ /NO__

6. Is there a history of family violence in your family of origin or your partner's? YES__ /NO__

**7. Do you or your partner have a problem with alcohol or drugs?
YES__ /NO__**

8. Have either of you ever threatened suicide?

9. Are there any weapons in the home?

10. Have you ever been injured by your partner during the relationship?



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For payment of fees, our preferred method of payment of payment, is etransfer to legaladmin@redmondlaw.ca

For payment by credit card, services charges may apply.

Credit Card Authorization

We confirm that your signature below authorizes us to pay any outstanding balance on your account with this credit card:

VISA___MASTERCARD___

Cardholder's Name: _____

Card Number: _____ Expiry Date: _____ CVV# _____

Signature: _____

Client Relationship Chronology Form

Include details such as date of marriage, children's birth, dates of employment, employment history, a concise chronology of the significant events in your relationship history including date of marriage, date of separation, children's birthdates, employment start and end dates, changes in employment or income. Please be as concise as possible. Please note, this is not meant to replace the information you have already provided, but simply to give us an idea of when things happened.

[illegible]

FAMILY LAW DOCUMENT CHECKLIST

One of the most important documents family law clients usually are required to complete is the Form F8 Financial Statement, a prescribed form under Rule 5-1 of the Supreme Court Family Rules. It requires information on the client's income, expenses, assets, and liabilities and is frequently appended as schedules to family law agreements as evidence of full financial disclosure by both parties.

Section 84 of the *Family Law Act* of British Columbia defines **family property** as: *All real property and personal property owned by either spouse as of the date of separation.*

Section 85 of the *Family Law Act* defines **excluded property** as: *Property acquired by either spouse before the relationship between the spouses began; this could include gifts or inheritances, a personal property settlement, or proceeds from an insurance policy. Any increase in the value of **excluded property** is considered from the date it is received to the date of separation to be family property.*

If your separation involves the division of property or child or spousal support, you will need to gather documents for any of the following assets, debt expenses, or income that are relevant to you or your family:

INCOME	
	The last 3 years of your Income Tax Returns, with attachments and your Notices of Assessment, if received.
	The last 3 years of your spouse's Income Tax Returns, with attachments and Notices of Assessment, if received.
	Your last 3 pay stubs, with code.
	Your spouse's last 3 pay stubs, with code.
	Evidence of any other sources of income for either of you, including bonuses, corporate share purchase agreements, child or spousal support, retirement or disability plan payments, EI, Federal or Provincial Child Benefits, etc.

EXPENSES	
<i>Please provide the most recent statements.</i>	
	Mortgage Statement
	Rental Agreement
	Loan statement(s)
	Car Lease(s) or Loan (s)
	Line(s) of Credit statement(s)
	Property Tax Statement(s)
	Property Insurance Statement(s)

	Life Insurance
	Child Care
	Child Education
	Hydro
	Telephone
	Household Budget or Cash Flow Summary
	Other

ASSETS	
<i>Please provide the most recent statements.</i>	
	Certificate(s) of Title
	RRSP Statement(s)
	Pension Statement(s)
	Extended Health Care employment plan(s)
	RESP Statement(s)
	Family Trust(s)—document creating the trust & current account statement(s)
	Bank—Chequing and Savings Accounts
	Securities and/or Mutual Fund Accounts
	Whole Life Insurance—certificate(s) and statement(s)

	Private Corporation or Partnership—Most recent income tax return, with
	Jewelry—List and provide evidence of appraised value and/or purchase price
	Collectables—List and provide evidence of purchase price and/or appraised
	Art Work—List and evidence of appraised value and/or purchase price
	Motor Vehicle(s)—purchase price
	Airline “miles” statement(s)
	Canada Pension Plan Statements
	Life Insurance(s)
	List of household furnishings, china, crystal, computer, stereo, TV, etc., with used, as is, estimate of value
	Tax Free Savings Account

DEBTS	
<i>Please provide the most recent statements. NOTE: Some of these may also be listed under Expenses</i>	
	Mortgage(s)
	Line(s) of Credit
	Car Lease(s) or Loan(s)
	Credit Card(s)
	Loan(s)
	Income Tax owing
	Other

OTHER	
	Your current Will.
	Any Pre-Nuptial Agreement, Marriage Agreement, or Separation Agreement that you and your spouse have signed.
	Marriage Certificate
	If either of you were not born in Canada, evidence of your current status in Canada.

IF YOU OR YOUR SPOUSE OWNED PROPERTY BEFORE YOUR RELATIONSHIP
OR HAVE RECEIVED AN INHERITANCE

	Documentation or statements to show the value of the property on the date you received it or the date you began living together with your spouse
	Documents to show the value of any inheritance you or your spouse received
	Documents or statements to show the current value of your inheritance or excluded property