



**REDMONDLAW**

The Village at Park Royal  
203-815 Main Street  
West Vancouver, B.C.  
Canada V7T 2Z3

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**DATE:** \_\_\_\_\_

**CLIENT INFORMATION INTAKE FORM – MARRIAGE/COHABITATION AGREEMENT**

**Personal Information:**

Your Full name and date of birth:	
Address:	
City:	Postal Code:
Home phone:	Cell phone:
Email address:	
Future Spouse's full name and date of birth:	

**Intentions**

1. What is your date of cohabitation? \_\_\_\_\_
2. What is your intended date of marriage if you intend to marry? \_\_\_\_\_

**Previous Cohabitation**

3. Were you married previously? \_\_\_\_\_ Was your spouse married previously? \_\_\_\_\_
4. Were you divorced previously? \_\_\_\_\_ Was your spouse married previously? \_\_\_\_\_

**Children**

5. Do you have children? \_\_\_\_\_ Does your spouse have children? \_\_\_\_\_
6. If yes, what are their names and ages? (please indicate if they are your spouse's children or your own and whether or not they are financially dependent upon you)

_____	_____
_____	_____
_____	_____
_____	_____

**Employment**

7. What is your occupation and your annual income?

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8. What is your spouse's occupation and annual income?

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**Assets (include description and current value)**

	<b><u>Yours</u></b>	<b><u>Your Spouse's</u></b>
9. Real Property:	<hr/> <hr/>	<hr/> <hr/>
10. Bank Accounts:	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>
11. Investments:	<hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/>
12. Pension:	<hr/> <hr/>	<hr/> <hr/>
13. Life Insurance:	<hr/> <hr/>	<hr/> <hr/>
14. Other:	<hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/>

15. Any important information pertaining to the acquisition of assets?

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16. Were any of the above assets purchased jointly? If yes please give details.

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17. Are you and your spouse intending to purchase assets jointly?

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**Liabilities**

	<u><b>Yours</b></u>	<u><b>Your Spouse's</b></u>
18. Real Property:	<hr/> <hr/>	<hr/> <hr/>
19. Bank Accounts:	<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>
20. Investments:	<hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/>

21. Credit Cards: \_\_\_\_\_  
\_\_\_\_\_

22. Any information relevant to the debts, or acquisition of debts?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

23. Are you intending to share debts or enter into joint debt with your spouse?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

24. Do you and your spouse intend to be financially independent during the relationship?  
\_\_\_\_\_  
\_\_\_\_\_

**Management of Household Expenses**

25. What is your intention with respect to management of household expenses once you are married or living together?  
\_\_\_\_\_  
\_\_\_\_\_

**Inheritance**

26. Have you or your spouse received an inheritance, or do you expect to receive an inheritance?  
\_\_\_\_\_  
\_\_\_\_\_

27. Do either you or your spouse have life insurance and if so are you each other's beneficiaries? If yes provide details.

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**Intentions in Agreement in the event of Separation:**

28. Do you intend to pay spousal support to each other if the relationship ends?

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29. Do you intend to divide property if your relationship ends or will you remain separate as to property?

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30. Will you share the increase in value of your excluded property if the relationship ends?

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31. Will you each be making wills and leaving your assets and estate to your beneficiaries as you see fit?

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32. Is there any other information that you think should be included in your cohabitation agreement?

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33. Please attach the **most recent** copy of the following statements or documents to this questionnaire, if relevant.

- a. **BC Assessment if you own real property,**
- b. **RRSP**
- c. **Investment account**
- d. **Bank account**
- e. **Credit cards**
- f. **Line of credit**
- g. **mortgage statement**

**Other relevant documents attached – please list**

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### **Credit Card Authorization**

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

VISA –or- MASTERCARD (circle one)

Cardholder's name:

Expiry Date:

Card Number:

Signature: