

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

## PERSONAL & FAMILY INFORMATION

### **GENERAL INFORMATION:**

NAME: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

CITIZENSHIP: \_\_\_\_\_ PLACE OF BIRTH: \_\_\_\_\_

ADDRESS: \_\_\_\_\_  
(including postal code) \_\_\_\_\_

TELEPHONE: (HOME) ( ) \_\_\_\_\_ (WORK) ( ) \_\_\_\_\_

OCCUPATION: \_\_\_\_\_ EMPLOYER: \_\_\_\_\_

### **INFORMATION REGARDING YOUR SPOUSE/PARTNER/FIANCÉ:**

1. Do you have a Spouse/Partner/Fiancé? Yes \_\_\_\_ No \_\_\_\_
  - a. If No, are you contemplating Marriage soon? Yes \_\_\_\_ No \_\_\_\_  
If Yes, date of intended marriage \_\_\_\_\_
  - b. If Yes, name of Spouse/Partner/Fiancé \_\_\_\_\_ Date of Birth \_\_\_\_\_  
If Yes, date of marriage \_\_\_\_\_
2. Married in Ontario? Yes \_\_\_\_ No \_\_\_\_ If No, where? \_\_\_\_\_
3. Do you have a Marriage or Domestic Contract? Yes \_\_\_\_ No \_\_\_\_  
(If Yes, please bring a copy of the Contract with you to your appointment)
4. Citizenship of your Spouse/Partner/Fiancé? \_\_\_\_\_
5. Domicile of your Spouse/Partner/Fiancé? \_\_\_\_\_

### **INFORMATION REGARDING FORMER SPOUSE (including anyone with whom you lived with for more than 2 years):**

1. Do you have a former spouse? Yes \_\_\_\_ No \_\_\_\_

2. If Yes, name of previous spouse? \_\_\_\_\_
3. If No, is your divorce final? Yes \_\_\_\_ No \_\_\_\_  
 If Yes, date and place of divorce \_\_\_\_\_  
 If No, please explain \_\_\_\_\_
4. Do you have any financial obligations to your former spouse? Yes \_\_\_\_ No \_\_\_\_
5. If Yes, please provide details \_\_\_\_\_
6. Are there Children of the previous marriage? Yes \_\_\_\_ No \_\_\_\_

**INFORMATION REGARDING YOUR CHILDREN AND DEPENDANTS:**

	Full Name of Child	Address	Birth Date	Other Parent of Your Child	Married/ Single (Full Name of Spouse of Child)	Number and Age of Children of your Child
(1)	_____	_____	_____	_____	_____	_____
(2)	_____	_____	_____	_____	_____	_____
(3)	_____	_____	_____	_____	_____	_____
(4)	_____	_____	_____	_____	_____	_____
(5)	_____	_____	_____	_____	_____	_____
(6)	_____	_____	_____	_____	_____	_____

Are any of your children dependants (or do you pay child support)? Yes \_\_\_\_ No \_\_\_\_  
 If Yes, Details \_\_\_\_\_

Do you have any other dependants (ie. - parent, brother, sister)? Yes \_\_\_\_ No \_\_\_\_  
 If Yes, Details \_\_\_\_\_

**INFORMATION REGARDING YOUR ASSETS:**

1. Life Insurance? Yes \_\_\_\_ No \_\_\_\_

If Yes,	Name of Company	Beneficiary	Policy Number	Amount
(1)	_____	_____	_____	_____
(2)	_____	_____	_____	_____
(3)	_____	_____	_____	_____

2. R.R.S.P.? Yes \_\_\_\_ No \_\_\_\_

If Yes, is your spouse the beneficiary of ALL of them? Yes \_\_\_\_ No \_\_\_\_

With whom are your R.R.S.P.s? \_\_\_\_\_  
\_\_\_\_\_

3. R.R.I.F.? Yes \_\_\_\_ No \_\_\_\_

If Yes, is your spouse the beneficiary of ALL of them? Yes \_\_\_\_ No \_\_\_\_

With whom are your R.R.I.F.s? \_\_\_\_\_  
\_\_\_\_\_

4. Do you own any Real Estate? Yes \_\_\_\_ No \_\_\_\_

If Yes, in whose name? \_\_\_\_\_ Jointly Owned? \_\_\_\_\_

Details of Real Estate (Value, Location, mortgage, date purchased, is this a matrimonial home?) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Do you own at least one automobile? Yes \_\_\_\_ No \_\_\_\_

If Yes, in whose name? \_\_\_\_\_ Jointly Owned? \_\_\_\_\_

6. Do you own any other vehicles, boats, etc.? Yes \_\_\_\_ No \_\_\_\_

If Yes, Details (Who owns what? Jointly Owned?) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Do you own any furniture? Yes \_\_\_\_ No \_\_\_\_

Who owns what? \_\_\_\_\_ Jointly Owned? \_\_\_\_\_

8. Do you own any other personal effects of note (jewellery, special collections)? Yes \_\_\_\_ No \_\_\_\_  
If Yes, Details (Who owns what? Jointly Owned?) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Do you own any assets outside Ontario or hold any foreign stocks? Yes \_\_\_\_ No \_\_\_\_  
If Yes, Details \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10. Do you have any bank, trust or credit union accounts? Yes \_\_\_\_ No \_\_\_\_  
If Yes, Where (Details: Bank, Location, Amount, Jointly Owned?)  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_

11. Do you have a safety deposit box? Yes \_\_\_\_ No \_\_\_\_  
If Yes, where is it? \_\_\_\_\_  
Key # 1 \_\_\_\_\_  
Key #2 \_\_\_\_\_

12. Do you own a small business or shares in a private corporation? Yes \_\_\_\_ No \_\_\_\_  
If Yes, Details \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

13. Do you have a Shareholders' Agreement in that private corporation? Yes \_\_\_\_ No \_\_\_\_  
(If Yes, please bring a copy of the Agreement with you to your appointment.)

14. Other than what you have mentioned above, do you have any other investments? Yes \_\_\_\_ No \_\_\_\_

If Yes, where are the securities kept? \_\_\_\_\_

What is the approximate present total value of those investments? \_\_\_\_\_

15. What types of investments are they? (check off all that apply to you)

G.I.C.s \_\_\_\_\_

Bonds \_\_\_\_\_

Stocks \_\_\_\_\_

Other \_\_\_\_\_ Details \_\_\_\_\_

\_\_\_\_\_

16. Do you have any pension(s) through your employment? Yes \_\_\_\_ No \_\_\_\_

If Yes, Details \_\_\_\_\_

\_\_\_\_\_

17. Do you own any assets jointly with someone other than your spouse? Yes \_\_\_\_ No \_\_\_\_

If Yes, Details \_\_\_\_\_

\_\_\_\_\_

18. Do you have any assets registered in your name that are not yours but that you are holding in trust for someone else? Yes \_\_\_\_ No \_\_\_\_

If Yes, Details \_\_\_\_\_

\_\_\_\_\_

19. Are you presently working as an Executor/Estate Trustee where the person has died but the estate is not yet finished? Yes \_\_\_\_ No \_\_\_\_

If Yes, Details \_\_\_\_\_

\_\_\_\_\_

Has someone already died leaving you money/assets and the estate is not yet finished? Yes \_\_\_\_ No \_\_\_\_

If Yes, Details \_\_\_\_\_

\_\_\_\_\_

20. What other types of assets do you have that are not already included in the above topics?

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**INFORMATION REGARDING YOUR DEBTS:**

Types of Debts that You Have (Check off all that apply to you):

None \_\_\_\_\_

Mortgage(s) on house \_\_\_\_\_

Car, bank, trust, credit union loans \_\_\_\_\_

Credit Card Debt \_\_\_\_\_

Other \_\_\_\_\_ Details \_\_\_\_\_

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