

NEW CLIENT INFORMATION FORM

Personal Information:

Name:

Maiden Name:

Previous Married Names:

Mailing Address:

Telephone: Home:

Work:

Cellular:

Other:

E-Mail

Date of Birth:

Place of Birth:

Name of Employer:

Address of Employer:

Occupation:

How long employed there:

Monthly Salary:

In Alberta at least One Year:

Spouse's Personal Information:

Name:

Maiden Name:

Previous Married Names:

Mailing Address:

Telephone: Home:

Work:

Cellular:

Other:

Date of Birth:

Place of Birth:

Name of Employer:

Address of Employer:

Occupation:

How long employed there:

Monthly Salary:

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Details of Marriage/Separation:

Place of Marriage:

Date of Marriage:

Marital Status at time of Marriage:

You:	Single	Divorced	Widowed
Spouse:	Single	Divorced	Widowed

Did you live together before?

If yes, when?

Date of Separation:

Where were you living?

Grounds?

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Children

Name:

Date of Birth:

Name:

Date of Birth:

Name:

Date of Birth:

Where are the children living?
Is the other parent seeing them?
If yes, schedule?
Are you paying/receiving support?
If yes, how much/how often?
Court order or agreement?

Court Proceedings:
Pre-nup or other agreement?
Prior court proceedings?

Reconciliation/Mediation:
Attempted counselling?
If yes, details?
Possibility of reconciliation?

Assets:
Own a home?
In whose name?
Who's living there now?
When Purchased?
Purchase Price?
Mortgage?
Monthly Payment?
Value Today?
Other Real Estate:
Furniture Divided? Happy?
Life insurance?
Vehicles

Year/Make/Model
Registered to?
In Possession of?
Acquired when?
Purchase Price?
Debt owing?
Monthly Payment?

Year/Make/Model
Registered to?
In Possession of?
Acquired when?
Purchase Price?
Debt owing?
Monthly Payment?

Year/Make/Model
Registered to?
In Possession of?
Acquired when?
Purchase Price?
Debt owing?
Monthly Payment?

Recreational Vehicles

Year/Make/Model
Registered to?
In Possession of?
Acquired when?
Purchase Price?

Debt owing?
Monthly Payment?

Year/Make/Model
Registered to?
In Possession of?
Acquired when?
Purchase Price?
Debt owing?
Monthly Payment?

Bank Accounts

Bank?
Whose name?
Balance?

Bank?
Whose name?
Balance?

Bank?
Whose name?
Balance?

RRSPs, GICs, etc

Type of Investment?
Institution?
Whose name?
Current value?

Type of Investment?

Institution?

Whose name?

Current value?

Type of Investment?

Institution?

Whose name?

Current value?

Pension Plan?

Interest in Business?

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Debts

(See Mortgage above)

(See Vehicles above)

Other Bank Loans

Bank?

Whose name?

Original Amount?

Current Amount?

Monthly Payment?

Bank?

Whose name?

Original Amount?

Current Amount?

Monthly Payment?

Credit Card debts

