

**PRENUPTIAL / COHABITATION
AGREEMENT QUESTIONNAIRE**
FAMILY LAW

Date: _____ Referred By: _____
Lawyer: _____ Legal Assistant: _____

>>> CLIENT IDENTIFICATION

Full Name: _____
Home Address: _____
Mailing Address: _____

Home Phone: _____ Work: _____
Cell: _____ Email: _____

Date of Birth: _____ Place of Birth: _____
Surname at Birth: _____ Surname Prior to this Marriage: _____
Social Insurance Number: _____

Employer: _____ Occupation/Position: _____
If self-employed, describe: _____
Work Address: _____

Person to contact if you are unavailable: _____
Home Phone: _____ Work: _____ Cell: _____

>>> FUTURE SPOUSE IDENTIFICATION

Full Name: _____
Home Address: _____
Mailing Address: _____

Home Phone: _____ Work: _____
Cell: _____ Email: _____

Date of Birth: _____ Place of Birth: _____
Surname at Birth: _____ Surname Prior to this Marriage: _____
Social Insurance Number: _____

Employer: _____ Occupation/Position: _____
If self-employed, describe: _____
Work Address: _____

>>> PRIOR MARRIAGE OF EITHER OR BOTH PARTIES

Client: Yes No

If yes, to whom and how was the marriage terminated? e.g. divorce:

Are there any spousal support or other financial obligations from or to a prior spouse?

Spouse: Yes No

If yes, to whom and how was the marriage terminated? e.g. divorce

Are there any spousal support or other financial obligations from or to a prior spouse?

Are there any children from this or a prior relationship of either party?

>>> CHILDREN

NAME (First, Middle, Last)	DATE OF BIRTH	MOTHER'S NAME	FATHER'S NAME

Living arrangements for children:

Is any child support currently being paid for any of the children? Yes No

If yes, describe:



>>> MARRIAGE / COMMON LAW RELATIONSHIP

Expected date of Marriage / Cohabitation: _____

Anticipated Place of Marriage? _____

Did you live together prior to the marriage? Yes No

If so, when and where?

>>> PURPOSE OF PRENUPTIAL OR COHABITATION AGREEMENT

(Check all that apply)

- Ensure financial stability of children
- Determine division of assets and/or liabilities in the event of a separation
- Maintain assets as separate property in the event of separation
- Permit the parties to enter into a Will without legal claims to the other party
- Provide for spousal or partner support to either party on separation
- Waive spousal or partner support in the event of separation

Other reasons:

Do you currently own or plan to own property jointly with your future spouse? Yes No

If yes, describe:

How would you like your property and your spouse's property to be divided on separation?

>>> FINANCIAL INCOME INFORMATION

INCOME PARTICULARS	CLIENT - AMOUNT	SPOUSE - AMOUNT
Employment Income	\$	\$
Pay Period (weekly, bi-weekly, monthly)		
Employment Insurance Benefits	\$	\$
Worker's Compensation Benefits	\$	\$
Interest and Investment Income	\$	\$
Expected total income in the current year	\$	\$
Pension Income	\$	\$
Self-employment Income	\$	\$
Other Income (describe)	\$	\$



Client:

Total Income (line 150) on last filed Tax Return: \$ _____ Year: _____

Expected Income (line 150) of this year's Tax Return: \$ _____

Future education or employment, if known: _____

Spouse:

Total income (line 150) on last filed Tax Return: \$ _____ Year: _____

Expected income at line 150 of this year's Tax Return: \$ _____

Future education or employment, if known: _____

Does either party expect to receive any inheritances, third party gifts, settlements for damage or insurance proceeds? Yes No

Provide details, if known: _____

If yes, please list the estimated value: \$ _____

Do you hold any assets in joint tenancy with your prospective spouse? Yes No

If yes, please list: _____

>>> ASSETS

Please list and provide the estimated present fair market values of all your and your spouse's assets and any assets held in trust for either party.

ASSET	PARTICULARS	IN WHOSE NAME?	VALUE (ESTIMATED)
1. Real Estate <i>(List any and all interests in land, e.g., leasehold interests and mortgages, whether or not you are registered as owner. Provide legal descriptions and indicate estimated market value of your interest without deducting encumbrances or costs of disposition.) (Record encumbrances under debts.)</i>	Address:		
2. Vehicles <i>(List all cars, trucks, motorcycles, quads, trailers, motor homes, boats, etc.)</i>	Year/Make/Model		
3. Financial Assets <i>(List all savings and chequing accounts, term deposits, GICs, stocks, bonds, Canada Savings Bonds, mutual funds, insurance policies (indicate beneficiaries), accounts receivable, etc.)</i>	Institution & Acct. #:		



>>> ASSETS

Please list and provide the estimated present fair market values of all your and your spouse's assets and any assets held in trust for either party.

ASSET	PARTICULARS	IN WHOSE NAME?	VALUE (ESTIMATED)
4. Pension and RRSPs <i>(Indicate name of institution where accounts are held, name and address of pension plan and pension details)</i>	Provider & Acct. # / Policy #:		Years of Contribution:
5. Corporate/Business Interests <i>(List any interest you or your spouse hold, directly or indirectly, in any corporation, unincorporated business, partnership, trust, joint venture, etc.)</i>	Name, Reg. Office, Officer / Director:		# of Shares & Value:
6. Other <i>(List anything else of value that you or your spouse own, e.g., precious metals, collections, works of art, jewelry or household items of high value. Include location of any safety deposit boxes)</i>			

DEBT	PARTICULARS / CREDITOR	IN WHOSE NAME?	BALANCE OWING
1. Secured Debts <i>(List all mortgages, lines of credit, car loans, and any other debt secured against any asset)</i>			
2. Unsecured Debts <i>(List all bank loans, personal loans, lines of credit, overdrafts, credit cards and any other debts that you or your spouse have.)</i>			
3. Other <i>(List any other debts, or liabilities e.g. car lease payment.)</i>			



>>> YOUR GOALS

Your main goals for the prenuptial / cohabitation agreement are as follows (if not already stated above):

