

CLIENT INFORMATION FORM
(Please fill this in as best as you can - it will save time and cost)

Confidential Information

Your Information:

Your full legal name: (Given names and surname) _____

Surname at birth: _____

Your full legal name *prior to* your marriage (if applicable): _____

Cell Phone Number: _____

Can we contact you at this number? **YES** **NO**

- Can the office/lawyer leave a voice-message at this number? **YES** **NO**

Email Address: _____

Can we contact you at this email address? **YES** **NO**

- If not, do you have an alternative email address? _____

- Have you recently changed the password(s) to your email account(s)? **YES** **NO**

Home Telephone Number: _____

Can we contact you at this number? **YES** **NO**

- Can the office/lawyer leave a voice-message at this number? **YES** **NO**

Business Telephone Number: _____

Can we contact you at this number? **YES** **NO**

- Can the office/lawyer leave a voice-message at this number? **YES** **NO**

Home Address and postal code: _____

Can we send correspondence to you at your home address? **YES** **NO**

If NO, do you have a contact name and address where the office can send mail to you?

Name of your employer/your business: _____

Business Address and postal code: _____

Can we send correspondence to you at your business address? **YES** **NO**

Your occupation: _____

Your *gross* salary (i.e. before deductions):

Monthly \$ _____ Annually \$ _____

Do you have any other sources of income or remuneration? **YES** **NO**

Details: _____

Your date of birth (DD/MM/YEAR): ____/____/____ Your place of birth: _____

You have resided in British Columbia since when? (date) _____

Your Citizenship(s): _____

Have you ever been, or are you, an American (U.S.) citizen? **YES** **NO**

The Other Party/Person's Information:

Other Party/Person's full legal name: (Given names and surname) _____

Other Party/Person's surname at birth: _____

Other Party/Person's full legal name *prior to your marriage* (if applicable): _____

Other Party/Person's Home Address and postal code: _____

Other Party/Person's Home Telephone Number (for information/not to contact): _____

Other Party/Person's Cell Phone Number (for information/not to contact): _____

Other Party/Person's email Address (for information/not to contact): _____

Name of the other Party/Person's employer or business: _____

Other Party/Person's Business Telephone Number (for information/not to contact): _____

Other Party/Person's Business Address (for information/not to contact): _____

Other Party/Person's occupation: _____

The other Party/Person's *gross* salary (i.e. before deductions):

Monthly \$ _____ Annually \$ _____

Any other known sources of income or remuneration for the other Party/Person's

Other Party/Person's Date of Birth:(DD/MM/YEAR): __/__/__ Place of birth: _____

The other Party/Person has resided in British Columbia since when?(DD/MM/YEAR): __/__/__

The other Party/Person's Citizenship(s): _____

Has the other Party/Person ever been, or is, an American (U.S.) citizen? YES NO **Information on marriage/relationship:**

Date of marriage: (DD/MM/YEAR): __/__/____

Place of marriage (City, Province, Country): _____

Do you have a copy of the original marriage certificate? YES NO Did you live together before marriage? YES NO

- If so, the date you began living together: (DD/MM/YEAR): __/__/____

If not married, date of first cohabitation: (DD/MM/YEAR): __/__/____

Date of separation of you and the other Party/Person:(DD/MM/YEAR): __/__/__ (or still TBD?)

Your marital status at the time of this marriage (i.e. divorced/never married/widow(er)):
_____The other Party/Person's marital status at the time of this marriage: (i.e. divorced/never married/
widow(er)): _____

Are there any written agreements between you and the other Party/Person (e.g. cohabitation agreement, pre-nuptial agreement, separation agreement, etc)? **YES** **NO**

- If so please provide/bring in a copy.

Were you ever involved in any court proceedings in connection with the marriage/cohabitation, or in connection with any of the children of the relationship? **YES** **NO**

- If so, please provide/bring in copies of any Court documents and/or Orders.

Were you or the other Party/Person ever married before (i.e. before this relationship)?

YES **NO**

- If so, what is the name of the prior spouse(s)? _____
- If so, provide details of prior marriage (date/place, etc.) _____, or divorce (or death) of prior spouse (if applicable): _____
- If so, do you/other Party/Person have children from a prior relationship? **YES** **NO**
- If so, what are the child(ren)'s name(s) and age(s): _____

When you and the other Party/Person cannot agree on something, what usually happens?

- A. We are usually able to work it out together.
- B. Sometimes we can work it out together.
- C. One person makes the decision (if so, who? _____)
- D. We do not work it out.

- Comments or Examples (briefly): _____

Are you aware of 'alternatives to dispute resolution', such as collaborative law, mediation, arbitration and/or parenting coordination? **YES** **NO**

Are you presently seeing a counselor, therapist, psychologist and/or psychiatrist? **YES** **NO**

- If yes, who? _____

Children's Information:

Children of the marriage/relationship:

Full legal name of Child	Complete date of Birth (DD/MM/YEAR)	Place of Birth City and Province

Who do the children live with most of the time? _____

Is there a 'parenting plan' in place? **YES** **NO**

- If so, what are the basic details: _____

Do you or the other Party/Person pay child support for these children? **YES** **NO**

- If yes, details _____

Does anyone apart from you/the other Party pay child support for these children? **YES** **NO**

- If yes, details _____

How well do you and the other Party/Person talk to each other *about the child(ren)*?

VERY WELL **SOMETIMES WELL** **POORLY** **VERY POORLY**

- Comments or Examples (briefly): _____

Do the children presently see a counselor, therapist, psychologist and/or psychiatrist?

YES NO

- If yes, who? _____

Information on assets and debts

List assets owned by you, the other Party/Person, or both of you that are worth more than \$1,000. Indicate who owns each asset (**Provide separate page(s) if required**):

<u>Assets</u>	Amount (approximate)	Owned by Self/Spouse/Joint

Were any of the asset(s) listed above owned by you or the other Party/Person *before* the start of your relationship with them? YES NO

- If yes, please provide details: _____

Did you or the other Party/Person receive an inheritance and/or a settlement from a personal injury case (e.g. car accident), *before or during* your relationship with them? YES NO

- If yes, please provide details: _____

List any debts owed by you, your spouse, or both of you that amount to more than \$1,000. Indicate who is responsible for the debt (**Provide separate page(s) if required**):

<u>Debts</u>	Amount (approximate)	Debt of Self/Spouse/Joint

Were any of the debt(s) listed above owed by you or your spouse/partner before the start of your relationship? YES NO

- If yes, please provide details: _____

Please make note of any other property, asset(s) and/or debt(s) you brought into the relationship but then sold, transferred and/or paid-off during your relationship. (**Provide separate page(s) if required**). _____

How did you find out about our Firm or Lawyer(s)? Or who in particular referred you to our office? (this is for our own information and not for us to contact them): _____

Please feel free to set out any other information that you want your lawyer to know on separate pages (such as a brief history of your relationship, questions or concerns you may have, or specific topics and/or areas of law that you require assistance with). Please try to provide this additional information, along with this Client Information Form, prior to our initial meeting with you.

Lastly, below is a listing of some information and/or documents that you can either bring with you to our first meeting, or we will likely be asking you to provide these to us as the matter progresses:

	Available (please check)
If married, the original government-issued Certificate of Marriage	
A photograph of your Spouse/Partner	
A copy of any written agreement(s) between you and your spouse	
A copy of any court documents (if there have been court proceedings commenced between you and your spouse)	
Copies of financial or other related documents which may be relevant: - Income Tax Returns and Notices of Assessment (for past 3 tax years) - Recent statements for bank accounts, mortgage(s), credit cards, RRSPs, TFSAs, RESPs, investment(s) & similar accounts - Recent real estate assessment(s) for any real property/home(s) - Statements for any pension(s) or similar retirement plan(s) - Any company/corporate financial statement(s)	

We thank you for taking the time to complete this form, and providing documents where and when requested. This will help expedite our initial consultation process, and will also assist any on-going retainer for legal services, thus expediting time and saving cost.

Sincerely,

The Watson Goepel Family Law Group
“A Relationship You Can Trust”