

COLLABORATIVE FAMILY LAW & FAMILY MEDIATION

Information to Gather Checklist

-
-
- ❖ **Your spouse will need to gather the same information as you do.**
 - ❖ **Your spouse will get this same To Do List from their lawyer.**
 - ❖ **Please give your spouse any of their documents so they can complete their own To Do List.**
-
-

___ **Bring in your \$750.00 cash advance on fees.**

___ **Sign and return the Contract for Legal Fees and Services.**

Gather these documents, if they apply to you, and bring them with you to the first four-way meeting.

___ Insurance policies (whole life, term life, long term disability)

___ Cash surrender value statements for whole life insurance

___ Government marriage certificate from Vital Statistics. Only one person needs to do this

___ Pay stubs for 3 months

___ Employment Contract, Collective Agreement or Employment Handbook with employment benefits

___ Current employment pension plan statement

___ Tax returns for 3 years including T-4's, T-5's and Assessment Notices. If you haven't got them and your spouse hasn't got yours, sign the CCRA consent form and get it back to our office right away so we can get your tax information

___ Bank Statements with cancelled cheques and copies of pass books for the last 6 months, chequing and savings

- ___ RRSP, GIC, T-Bill, Term Deposit, Canada Savings Bonds, brokerage statement, stock option agreements and any other investment statements for the last 6 months or from date of separation to the present time, whichever is longer
- ___ Copy of Net Worth statement provided to bank in last 3 years
- ___ Copy of title to house and any other land owned
- ___ Copy of appraisal for house, *if you have one* or your bank may have one
- ___ List of safety deposit box contents
- ___ List of vehicles, with appraisals, if you have them
- ___ Jewelry and art appraisals, if you have them
- ___ Current loan and mortgage statements
- ___ Copy of loan applications
- ___ Copy of all Personal Guarantees you have signed
- ___ Credit card statement for all credit cards, for the last 3 months
- ___ Any court papers relating to your marriage or your family
- ___ Any information you may have about assets, debts or property you owned before you got married
- ___ 3 years corporate financial statement, corporate tax returns and assessment notices and 6 months of corporate bank statements
- ___ Your estimated budget
- ___ Special expenses for your children