PRENUPTIAL/COHABITATION AGREEMENT QUESTIONNAIRE

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

CLIENT IDENTIFICATION

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

Home Phone: _____ Work: _____ Fax: _____
Mobile: _____ Email: _____

Date of Birth: _____ Place of Birth: _____

Social Insurance No.: _____

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

Person to Contact if You are Unavailable: _____
Home Phone: _____ Work: _____ Mobile: _____

FUTURE SPOUSE IDENTIFICATION

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

Home Phone: _____ Work: _____ Fax: _____
Mobile: _____ Email: _____

Date of Birth: _____ Place of Birth: _____
Social Insurance No.: _____

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?

_____

_____

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?

_____

_____

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

_____

_____

CHILDREN

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

_____

_____

_____

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 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		
Pension Income		
Self-employment Income		
Other Income (describe)		

Client:

Total Income (line 150) on last filed Income Tax Return _____ year _____

Expected income at line 150 of this year's Income Tax Return year

Future education or employment intentions (if known):

_____

Spouse:

Total Income (line 150) on last filed Income Tax Return _____ year _____

Expected income at line 150 of this year's Income Tax Return _____ year _____

Future education or employment intentions (if known):

_____

Does either party expect to receive any inheritances? 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 *(List any and all interests in land, including 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.)*	Address:		
2. Vehicles *(List all cars, trucks, motorcycles, trailers, motor homes, boats, etc.)*	Year/Make/Model		

Asset	Particulars	In Whose Name?	Value
3. Financial Assets *(List all savings and chequing accounts, term deposits, GICs, stocks, bonds, Canada Savings Bonds, mutual funds, insurance policies (indicate beneficiaries), accounts receivable, etc.)*	Institution & Acct #		
4. Pension and RRSPs *(Indicate name of institution where accounts are held, name and address of pension plan and pension details)*	Provider & Acct # / Policy #		Years of Contribution
5. Corporate/Business Interests *(List any interest you or your spouse hold, directly or indirectly, in any corporation, unincorporated business, partnership, trust, joint venture, etc.)*	Name, Reg. Office, Officer/Director		# of Shares & Value
6. Other *(List anything else of value that you or your spouse own, including precious metals, collections, works of art, jewellery or household items of high value. Include location of any safety deposit boxes)*	Description		

DEBTS

Debt	Particulars / Creditor	In Whose Name?	Balance Owing
1. Secured Debts *(List all mortgages, lines of credit, car loans, and any other debt secured against any asset)*			
2. Unsecured Debts *(List all bank loans, personal loans, lines of credit, overdrafts, credit cards and any other debts that you or your spouse have.)*			
3. Other *(List any other debts, or liabilities e.g. car lease payment.)*			

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

_____

_____

_____

_____

_____

_____

_____

_____

_____

Submit