

FINANCIAL INFORMATION REQUIRED FOR MEDIATION

Income:

1. How much money do you make (gross before taxes per year): _____
2. How much money does your spouse make (gross before taxes per year):

3. Please bring with you to the Mediation whatever proof of income you have available:
 - ☐ pay stub
 - ☐ EI statement
 - ☐ last year's Income Tax Return
 - ☐ last year's Notice of Assessment from Canada Revenue Agency
 - ☐ corporate Financial Statements for any business you own

If you do not have a copy of your Income Tax Return, please call Canada Revenue Agency at 1-800-959-8281 to request a copy.

Assets:

4. Do you own the residence where you live?
 - ☐ yes
 - ☐ noIf yes, how much do you think it is worth? _____
5. Do you own any other real estate?
 - ☐ yes
 - ☐ noIf yes, what is the address for each property?

What do you think each property is worth?

6. Do you own any motor vehicles (car, truck, motorcycle, boat, trailer, etc...)?

☐ yes

☐ no

If yes, what is the year, make, model of each, if known, and estimated value?

7. Have you been able to divide the household contents (including any jewellery, electronics, tools, etc...) between you and your spouse?

☐ yes

☐ no

What, if any, dispute is there with regard to the household contents?

8. Do you have an employment pension?

☐ yes

☐ no

If yes, please bring a recent Pension Statement to the Mediation.

9. Do you hold any bank accounts jointly with your spouse?

☐ yes

☐ no

Bank

Account Number

_____	_____
_____	_____

If any of these accounts have overdraft protection please indicate accordingly.

Please bring a copy of bank statement for each account for the date you separated to the Mediation.

10. Do you hold any bank accounts jointly with any person other than your spouse?

- ☐ yes
☐ no

<u>Bank</u>	<u>Account Number</u>
_____	_____
_____	_____
_____	_____
_____	_____

If any of these accounts have overdraft protection please indicate accordingly.

Please bring a copy of bank statement for each account for the date you separated to the Mediation.

11. Do you have any bank accounts in your sole name?

- ☐ yes
☐ no

<u>Bank</u>	<u>Account Number</u>
_____	_____
_____	_____
_____	_____
_____	_____

If any of these accounts have overdraft protection please indicate accordingly.

Please bring a copy of bank statement for each account for the date you separated to the Mediation.

12. Do you have any RRSP's?

- ☐ yes
☐ no

RRSP

Account Number

Please bring a copy of statement for each RRSP for the date you separated to the Mediation.

13. Do you have any RESP's?

- ☐ yes
☐ no

RESP

Account Number

Please bring a copy of statement for each RESP for the date you separated to the Mediation.

14. Do you have any TFSA's?

- ☐ yes
☐ no

TFSA

Account Number

Please bring a copy of statement for each TFSA for the date you separated to the Mediation.

15. Do you have any mutual funds or other investments?

- ☐ yes
☐ no

Mutual Funds/Investments

Account Number

Please bring a copy of statement for each mutual fund/investment for the date you separated to the Mediation.

16. Do you have any life insurance policies on your life?

- ☐ group through employment
☐ private policy

17. If you have life insurance through work:

- how much are the death benefits _____
- who is the beneficiary _____

18. If you have private life insurance, please list the details below:

Company

Policy Number

Death Benefit

Beneficiary

If you can, please bring a copy of each life insurance policy to the Mediation.

19. Are any of these policies a whole life policy, or otherwise have some savings or investment component to them?

- ☐ yes
☐ no

20. Do you own any life insurance policies which insure a life other than your own?

- ☐ yes
☐ no

If yes, please provide the details:

<u>Company</u>	<u>Policy Number</u>	<u>Death Benefit</u>	<u>Who's Life</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

21. Are you covered by any extended health plan benefits through your employment?

- ☐ yes
☐ no

If yes, check off all of the details below which applies to your benefits plan:

- ☐ extended health
☐ dental
☐ prescription
☐ spouse covered
☐ children covered

22. Are you self-employed or otherwise own an interest in a business?

- ☐ yes
☐ no

If yes, is your business run as either:

- ☐ sole proprietor
☐ incorporation
☐ partnership
☐ don't know

23. Does anyone owe you money?

- ☐ yes
☐ no

If yes, details: _____

24. Did you own an interest in a house, vehicle, bank account, investment, or other property on the day you were married?

- ☐ yes
☐ no

If yes, please list what you owned and provide an estimate of what it was worth on the day you were married:

<u>Item</u>	<u>Value</u>
_____	_____
_____	_____
_____	_____
_____	_____

25. Did you receive a significant gift from someone other than your spouse, an inheritance, a personal injury award or proceeds of a life insurance policy during the course of the marriage?

- ☐ yes
☐ no

If yes, please provide the details:

Debts and Liabilities

26. Do you have a mortgage on your home?

- ☐ yes
☐ no

If yes, please provide the details:

<u>Bank</u>	<u>Amount Owning</u>
_____	_____
_____	_____

Please bring a current mortgage statement to the Mediation.

27. Do you have any lines of credit?

☐ yes

☐ no

If yes, please provide the details:

<u>Bank</u>	<u>Account Number</u>	<u>Amount Owing</u>	<u>Joint or Sole</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please bring statements for all lines of credit to the Mediation.

28. Do you have any other loans (ie: vehicle loans, student loans, personal loans, loans from friends or family)?

☐ yes

☐ no

If yes, please provide the details:

<u>Creditor</u>	<u>Amount Owing</u>	<u>Joint or Sole</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

29. Do you have any credit cards?

☐ yes

☐ no

If yes, please provide the details below:

<u>Credit Card Company</u>	<u>Account Number</u>	<u>Amount Owing</u>	<u>Joint or Sole</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Please bring copies of statements for each card to the Mediation.