



Day + Borg LLP
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Confidential Memorandum – Family Matters

DATE:

CLIENT'S FULL NAME:

MAIDEN SURNAME IF FEMALE:

CURRENT ADDRESS:
(Include Postal Code)

TELEPHONE NUMBERS:

HOME:
WORK:
CELL:
PAGER:

EMAIL ADDRESS:

HOW LONG HAVE YOU LIVED IN THE REGION?

WHO REFERRED YOU TO OUR OFFICE? :

DATE OF BIRTH:

PLACE OF BIRTH:

HOW LONG HAVE YOU LIVED IN ONTARIO? :

EMPLOYER NAME & ADDRESS:

SALARY:

BONUSES:

OVERTIME EARNINGS:

BENEFITS:

WORK HISTORY:

(Brief)

SPOUSE

FULL NAME OF SPOUSE:

MAIDEN NAME OF SPOUSE, IF FEMALE:

ADDRESS OF SPOUSE:

PLACE OF BIRTH:

DATE OF BIRTH:

HOW LONG HAS YOUR SPOUSE LIVED IN REGION? :

RECENT EMPLOYMENT OF SPOUSE:

EMPLOYER AND ADDRESS:

EMPLOYER TELEPHONE:

SALARY:

BONUSES:

OVERTIME EARNINGS:

BENEFITS:

INCOME FROM OTHER SOURCES:

SPOUSE'S SOLICITOR:

DETAILS OF MARRIAGE/SEPARATION

DATE OF MARRIAGE:

PLACE OF MARRIAGE:

DO YOU HAVE A MARRIAGE CERTIFICATE: YES NO

PREVIOUS MARRIAGES OF EITHER YOURSELF OR SPOUSE?

PARTICULARS OF DIVORCE OR DEATH OF SPOUSE:

IF ONE OF THE PARTIES HAS BEEN DIVORCED,
IS A DECREE ABSOLUTE/CERTIFICATE OF DIVORCE AVAILABLE? YES
NO

DATE OF SEPARATION, IF APPLICABLE?

NAMES OF CHILDREN & DATES OF BIRTH:

NAME

DATE OF BIRTH

BIOLOGICAL CHILDREN? YES NO

PRESENT RESIDENCE OF CHILDREN:

DO THEY ATTEND SCHOOL & PARTICULARS OF EDUCATION:

NAME

SCHOOL

GRADE

IS THERE AN ARGUMENT ABOUT CUSTODY? YES NO

DAYCARE ARRANGEMENTS & MONTHLY COST:

IS RECEIPT PROVIDED BY DAYCARE?

YES

NO

MEDICAL HISTORY OF CHILDREN:

CURRENT DIVISION OF TIME WITH CHILDREN:

ANY SPECIAL PROBLEMS REGARDING CHILDREN?

POSITION ON CUSTODY/ACCESS:

ASSETS

HOUSE - MUNICIPAL ADDRESS:

PRESENT REGISTERED OWNER:

WHEN WAS IT PURCHASED? :

PRESENT MARKET VALUE:

OUTSTANDING MORTGAGES AND AMOUNTS:

WHO CONTRIBUTED TO THE DEPOSIT WHEN THE HOUSE WAS PURCHASED?

WHAT WAS THE DOWN PAYMENT? :

WHO CONTRIBUTES TO THE MORTGAGE PAYMENTS? :

ANY OTHER CONTRIBUTIONS DIRECTLY TO THE HOME? :

PREVIOUS MATRIMONIAL HOMES (Details):

OTHER REAL PROPERTY? :

WHO IS THE REGISTERED OWNER? :

MUNICIPAL ADDRESS:

OTHER FAMILY ASSETS:

(Boats, Cars, Household Contents...etc)

INVESTMENTS: (Stocks, Bonds, Collectibles)

BANK ACCOUNTS

NAME

ACCOUNT#

BALANCE

LIFE INSURANCE DETAILS:

DISABILITY INSURANCE/PENSION
RRSP/RHOSP/RESP DETAILS:

STOCK OPTIONS:

OTHER ASSETS:

ARE TAX RETURNS AVAILABLE? :

ANY RECENT INHERITANCE? :

LIABILITIES

LOANS PAYABLE (Details):

OTHER SIGNIFICANT DEBTS:

CREDIT CARD, CHARGE ACCOUNTS:

OTHER PROCEEDINGS

DATES & DURATIONS OF PREVIOUS SEPARATIONS:

OTHER LEGAL PROCEEDINGS:

EXISTING SEPARATION AGREEMENT:

EXISTING FINANCIAL/LIVING ARRANGEMENTS:

MICHAEL J. DAY TO COMPLETE THE FOLLOWING

GUIDELINE SUPPORT:

NOTES: