



**DAY + BORG LLP**  
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**CONFIDENTIAL MEMORANDUM – FAMILY INTAKE FORM**

Date: \_\_\_\_\_  
Full Legal Name: \_\_\_\_\_  
Other Names Used (if any): \_\_\_\_\_  
Maiden Surname (if Female): \_\_\_\_\_

**CONTACT INFORMATION:**

Full Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
Home: \_\_\_\_\_ Business: \_\_\_\_\_ Cell: \_\_\_\_\_  
Email: \_\_\_\_\_

**Who referred you to our firm?**

- |  |  |
|--|--|
| <input type="checkbox"/> Current Client                    | <input type="checkbox"/> Family / Friend                     |
| <input type="checkbox"/> Prepaid Legal Assistance Plan     | <input type="checkbox"/> Former Client of Richard T. Bennett |
| <input type="checkbox"/> Website / Noticed Office Location | <input type="checkbox"/> Other: _____                        |

Date of Birth: *Month* \_\_\_\_\_ *Day* \_\_\_\_\_ *Year* \_\_\_\_\_  
Place of Birth: \_\_\_\_\_  
Citizenship: \_\_\_\_\_  
Are you a citizen of any other country?: \_\_\_\_\_  
Immigration Status (*if applicable*): \_\_\_\_\_  
How long have you lived in the region?: \_\_\_\_\_  
\_\_\_\_\_  
Occupation: \_\_\_\_\_  
Employer Name & Address: \_\_\_\_\_  
Salary: \_\_\_\_\_  
Benefits: \_\_\_\_\_  
Income from other sources: \_\_\_\_\_  
Summarized Work History: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**DETAILS OF SPOUSE:**

Full Legal Name: \_\_\_\_\_  
Other Names Used (if any): \_\_\_\_\_  
Maiden Surname (if Female): \_\_\_\_\_

Date of Birth: *Month* \_\_\_\_\_ *Day* \_\_\_\_\_ *Year* \_\_\_\_\_

Place of Birth: \_\_\_\_\_

Citizenship: \_\_\_\_\_

Are you a citizen of any other country?: \_\_\_\_\_

Immigration Status (*if applicable*): \_\_\_\_\_

How long has your spouse lived in the region?: \_\_\_\_\_

Spouse's Occupation: \_\_\_\_\_

Employer Name & Address: \_\_\_\_\_

Salary: \_\_\_\_\_

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 available?:  Yes  No

Date of separation, if applicable?: \_\_\_\_\_

**CHILDREN:**

Names of children & dates of birth:

(1) Name: \_\_\_\_\_ DOB: \_\_\_\_\_

(2) Name: \_\_\_\_\_ DOB: \_\_\_\_\_

(3) Name: \_\_\_\_\_ DOB: \_\_\_\_\_

(4) Name: \_\_\_\_\_ DOB: \_\_\_\_\_

Present residence of children: \_\_\_\_\_

Are your children in school?:

(1) Name: \_\_\_\_\_ Grade: \_\_\_\_\_

School: \_\_\_\_\_

(2) Name: \_\_\_\_\_ Grade: \_\_\_\_\_

School: \_\_\_\_\_

(3) Name: \_\_\_\_\_ Grade: \_\_\_\_\_

School: \_\_\_\_\_

(4) Name: \_\_\_\_\_ Grade: \_\_\_\_\_

School: \_\_\_\_\_

Is there an argument about custody?:  Yes  No

Daycare arrangements & costs: \_\_\_\_\_

\_\_\_\_\_

Medical history of children: \_\_\_\_\_

\_\_\_\_\_

Are there any issues regarding the children, that we should be aware of?: \_\_\_\_\_

\_\_\_\_\_

**ASSETS:**

**Real Estate:**

(1) Principal Residence

Property Address: \_\_\_\_\_

Registered Owner(s): \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

Mortgage Particulars: \_\_\_\_\_

Current Fair Market Value: \_\_\_\_\_

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?: \_\_\_\_\_

(2) Secondary Residence

Property Address: \_\_\_\_\_

Registered Owner(s): \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

Mortgage Particulars: \_\_\_\_\_

Current Fair Market Value: \_\_\_\_\_

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?: \_\_\_\_\_

(3) Other Property

Property Address: \_\_\_\_\_

Registered Owner(s): \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

Mortgage Particulars: \_\_\_\_\_

Current Fair Market Value: \_\_\_\_\_

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?: \_\_\_\_\_

**Other Family Assets:** (i.e. vehicles, boats, jewellery, artwork, antiques, etc.)

(1) Description: \_\_\_\_\_ Value: \_\_\_\_\_

(2) Description: \_\_\_\_\_ Value: \_\_\_\_\_

(3) Description: \_\_\_\_\_ Value: \_\_\_\_\_

(4) Description: \_\_\_\_\_ Value: \_\_\_\_\_

If more space is needed please attach a separate sheet.

**Investments:** (e.g., term deposits, bonds, securities, stocks etc.)

Details: \_\_\_\_\_

\_\_\_\_\_

Investment Advisor: \_\_\_\_\_

Contact Information (Company's Name, Address & Telephone No.): \_\_\_\_\_

\_\_\_\_\_

If more space is needed please attach a separate sheet

**Bank Accounts:**

(1) Name of Bank: \_\_\_\_\_

Account Number: \_\_\_\_\_ Type of Account: \_\_\_\_\_

Account Balance: \_\_\_\_\_

(2) Name of Bank: \_\_\_\_\_

Account Number: \_\_\_\_\_ Type of Account: \_\_\_\_\_

Account Balance: \_\_\_\_\_

(3) Name of Bank: \_\_\_\_\_

Account Number: \_\_\_\_\_ Type of Account: \_\_\_\_\_

Account Balance: \_\_\_\_\_

If more space is needed please attach a separate sheet.

**Life Insurance:**

(1) Private Coverage

Name of Insurance Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Face Value: \_\_\_\_\_

Beneficiary Designation: \_\_\_\_\_

Name of Insurance Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Face Value: \_\_\_\_\_

Beneficiary Designation: \_\_\_\_\_

(2) Group Coverage

Employer's Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Face Value: \_\_\_\_\_

Beneficiary Designation: \_\_\_\_\_

**Disability Insurance, Pension Plans, RRSPs, RHOSPs, etc.**

(1) Description: \_\_\_\_\_

Amount: \_\_\_\_\_

Named Beneficiary (if any): \_\_\_\_\_

(2) Description: \_\_\_\_\_

Amount: \_\_\_\_\_

Named Beneficiary (if any): \_\_\_\_\_

(3) Description: \_\_\_\_\_

Amount: \_\_\_\_\_

Named Beneficiary (if any): \_\_\_\_\_

If more space is needed please attach a separate sheet.

**Are tax returns available?:**  Yes  No

**Have you or your spouse recently received an inheritance?:** \_\_\_\_\_

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**LIABILITIES:**

Loan(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Credit Card(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Line(s) of Credit: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Significant Debt(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**OTHER PROCEEDINGS:**

Dates & Durations of Previous Separations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Legal Proceedings: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Existing Separation Agreement: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

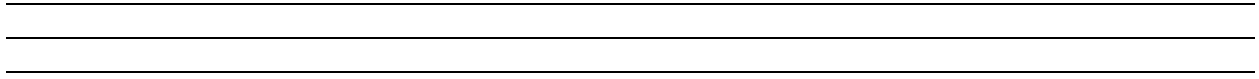
Existing Financial/Living Arrangements: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CSG Calculations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SSAG Calculations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NOTES:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



[Revised Nov 2020]