

RELATIONSHIP AGREEMENT CLIENT PROFILE	
GENERAL INFORMATION	
DATE	
<i>FULL LEGAL NAME</i>	
CURRENT ADDRESS	
TELEPHONE NUMBER	
WORK PHONE NUMBER	
DATE OF BIRTH	
PLACE OF BIRTH	
LAST NAME AT DATE OF BIRTH	
HAVE YOU BEEN RESIDING IN ALBERTA FOR THE LAST YEAR?	YES NO
CITIZENSHIP	
<i>FULL NAME OF SPOUSE / ADULT INTERDEPENT PARTNER / OTHER</i>	
CURRENT ADDRESS OF SPOUSE / OTHER / OTHER	
PHONE NUMBER OF SPOUSE / OTHER	
LAST NAME OF SPOUSE /OTHER AT BIRTH	
DATE BIRTH OF SPOUSE / OTHER	
PLACE OF BIRTH OF SPOUSE / OTHER	
HAS YOUR SPOUSE /OTHER BEEN RESIDING IN ALBERTA FOR THE LAST YEAR?	YES NO
CITIZENSHIP	
IF YOU ARE CURRENTLY MARRIED: (If not, please proceed to the next section)	
DATE OF MARRIAGE	
PLACE OF MARRIAGE	
DATE YOU STARTED LIVING TOGETHER	
DATE OF SEPARATION	
PLACE OF SEPARATION	

MARITAL STATUS PRIOR TO YOUR MARRIAGE	NEVER MARRIED _____ DIVORCED _____ WIDOWED _____
SPOUSE / OTHER'S MARITAL STATUS PRIOR TO YOUR MARRIAGE	NEVER MARRIED _____ DIVORCED _____ WIDOWED _____
SPOUSE / OTHER'S LAWYER NAME	
LAWYERS ADDRESS	
LAWYERS PHONE NUMBER	
IF YOU ARE NOT CURRENTLY MARRIED:	
DO YOU INTEND TO MARRY:	YES _____ NO _____
IF YES WHAT IF ANY IS YOUR INTENDED DATE OF MARRIAGE	
PLACE OF MARRIAGE	
DATE YOU STARTED LIVING TOGETHER	
MARITAL STATUS	NEVER MARRIED _____ DIVORCED _____ WIDOWED _____
SPOUSE / OTHER'S MARITAL STATUS PRIOR TO YOUR MARRIAGE	NEVER MARRIED _____ DIVORCED _____ WIDOWED _____
SPOUSE / OTHER'S LAWYER NAME	
LAWYERS ADDRESS	
LAWYERS PHONE NUMBER	
CHILDREN (IF APPLICABLE – PLEASE LIST CHILDREN FROM ALL RELATIONSHIPS)	
FULL NAMES OF CHILDREN	BIRTH DATES OF CHILDREN
ARRANGEMENTS/AGREEMENTS	
ARE YOU OR YOUR SPOUSE / OTHER CURRENTLY PAYING OR RECEIVING CHILD SUPPORT WITH REGARD TO ANY OF THE CHILDREN?	
EMPLOYMENT INFORMATION	
ARE YOU EMPLOYED? YES NO	

NAME OF EMPLOYER		
	YOUR GROSS MONTHLY INCOME	PAYMENT FREQUENCY (MONTHLY, WEEKLY)
	\$	
	WHAT WAS YOUR TOTAL INCOME LAST TAX YEAR?	WHAT WAS YOUR NET INCOME, AFTER TAX?
T4 - LINE 150 / 236	\$	\$

IS YOUR SPOUSE / OTHER EMPLOYED? YES NO

NAME OF EMPLOYER		
	YOUR GROSS MONTHLY INCOME	PAYMENT FREQUENCY (MONTHLY, WEEKLY)
	\$	
	WHAT WAS YOUR TOTAL TAXABLE INCOME LAST TAX YEAR?	WHAT WAS YOUR NET TAXABLE INCOME?
T4 - LINE 150 / 236	\$	\$

PENSION PLANS Indicate type of Pension Plan (i.e., is plan governed by Federal or Provincial legislation?) (Ask your employer who you may designate as a beneficiary under your Pension Plan)

COMPANY	CURRENT VALUE OF BENEFIT	BENEFICIARY
	\$	
	\$	
	\$	

SPOUSAL SUPPORT

HAVE YOU MADE ANY ARRANGEMENTS FOR SPOUSAL SUPPORT IN THE EVENT OF THE BREAKDOWN OF THE RELATIONSHIP? IF YES, PROVIDE PARTICULARS.

DO YOU HAVE A WILL? If not, why?

PROPERTY DIVISION

HAVE YOU MADE ANY ARRANGEMENTS FOR THE DIVISION OF PROPERTY ACCUMULATED OVER THE COURSE OF THE RELATIONSHIP IN THE EVENT OF THE BREAKDOWN OF THE RELATIONSHIP? IF YES, PROVIDE PARTICULARS.

APPENDIX "A"
ASSETS - YOU

ITEM DESCRIPTION	MORTGAGE /LOAN AMOUNT ASSOCIATED WITH THAT PARTICULAR ASSET	FAIR MARKET VALUE
PRIMARY RESIDENCE	\$	\$
LAND	\$	\$
	\$	\$
	\$	\$
ADDITIONAL PROPERTIES	\$	\$
	\$	\$
	\$	\$
VEHICLES AND/OR FARM EQUIPMENT		
	\$	\$
	\$	\$
	\$	\$
	\$	\$
INVESTMENTS (RRSP/RESP/GIC'S/PENSIONS, INSURANCE POLICIES ETC.)		
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
BUSINESS INTERESTS		
DESCRIBE FULL NAMES OF COMPANY, SHAREHOLDERS, NUMBER AND TYPE OF SHARE OWNED BY EACH SHAREHOLDER, NATURE OF BUSINESS, AS OWNED BY COMPANY, ACQUISITION COST AND CURRENT VALUE		
ARE THERE ANY RESTRICTIONS ON	YES _____ NO _____	

TRANSFER?		
IS THERE A BUY/SELL OR UNANIMOUS SHAREHOLDERS AGREEMENT?		YES _____ NO _____
PARTNERSHIP / UNINCORPORATED BUSINESS		
DESCRIBE		
PLEASE PROVIDE US WITH A COPY OF ANY OF THE FOLLOWING DOCUMENTS WHICH PERTAIN TO YOUR CIRCUMSTANCES:		
MARRIAGE CONTRACT	SHAREHOLDER AGREEMENT	WILL
COHABITATION AGREEMENT	BUY-SELL AGREEMENT	CODICIL(S)
DIVORCE DECREE	PARTNERSHIP AGREEMENT	SEPARATION AGREEMENT
MINUTES OF SETTLEMENT		
TRUST DEED IN WHICH YOU HAVE AN ONGOING ADMINISTRATIVE OR BENEFICIAL INTEREST		
WILL OF DECEASED PERSON OR TRUST DEED WHICH NAMES YOU AS A BENEFICIARY		

APPENDIX "A"
ASSETS - SPOUSE

ITEM DESCRIPTION	MORTGAGE /LOAN AMOUNT ASSOCIATED WITH THAT PARTICULAR ASSET	FAIR MARKET VALUE
PRIMARY RESIDENCE	\$	\$
LAND	\$	\$
	\$	\$
	\$	\$
ADDITIONAL PROPERTIES	\$	\$
	\$	\$
	\$	\$
	\$	\$
VEHICLES AND/OR FARM EQUIPMENT		
	\$	\$
	\$	\$
	\$	\$
	\$	\$
INVESTMENTS RRSP/RESP/GIC'S/PENSIONS, INSURANCE POLICIES ETC.)		
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
BUSINESS INTERESTS		
DESCRIBE FULL NAMES OF COMPANY, SHAREHOLDERS, NUMBER AND TYPE OF SHARE OWNED BY EACH SHAREHOLDER, NATURE OF BUSINESS, AS OWNED BY COMPANY, ACQUISITION COST AND CURRENT VALUE		
ARE THERE ANY RESTRICTIONS ON	YES _____ NO _____	

TRANSFER?		
IS THERE A BUY/SELL OR UNANIMOUS SHAREHOLDERS AGREEMENT?		YES _____ NO _____
PARTNERSHIP / UNINCORPORATED BUSINESS		
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COHABITATION AGREEMENT	BUY-SELL AGREEMENT	CODICIL(S)
DIVORCE DECREE	PARTNERSHIP AGREEMENT	SEPARATION AGREEMENT
MINUTES OF SETTLEMENT		
TRUST DEED IN WHICH YOU HAVE AN ONGOING ADMINISTRATIVE OR BENEFICIAL INTEREST		
WILL OF DECEASED PERSON OR TRUST DEED WHICH NAMES YOU AS A BENEFICIARY		

APPENDIX "B"
DEBTS - YOU

	PRESENT AMOUNT OUTSTANDING	ARREARS, IF ANY	PRESENT MONTHLY PAYMENTS
BANK LOANS	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
MORTGAGES	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
FINANCE COMPANIES	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
DEPARTMENT STORES	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
CREDIT CARDS	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
OTHER (SPECIFY)	\$	\$	\$
TOTAL	\$	\$	\$

APPENDIX "B"
DEBTS - SPOUSE

	PRESENT AMOUNT OUTSTANDING	ARREARS, IF ANY	PRESENT MONTHLY PAYMENTS
BANK LOANS	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
MORTGAGES	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
FINANCE COMPANIES	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
DEPARTMENT STORES	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
CREDIT CARDS	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
OTHER (SPECIFY)	\$	\$	\$
TOTAL	\$	\$	\$