

Family Client Homework

<input type="checkbox"/>	Marriage Certificate (can be obtained from any Motor Vehicle Registry).
<input type="checkbox"/>	Photograph of your Spouse (if filing for divorce).
<input type="checkbox"/>	Tax Returns for last 3 years – not just the Summary, the full Return (or, if not yet filed, copies of T4, T4A and all other relevant tax slips and statements disclosing any and all sources of income for the year).
<input type="checkbox"/>	Notices of Assessment/Reassessment from CRA for last 3 years.
<input type="checkbox"/>	Pay stubs from employer for last 3 pay periods, including year-to-date earnings (if not possible, then a letter from employer setting out that information including annual salary/remuneration).
<input type="checkbox"/>	Bank Account statements for last 6 months (sole and joint with any other person).
<input type="checkbox"/>	Credit Card/LOC Statements for last 6 months, including department store cards (sole and joint).
<input type="checkbox"/>	List with receipts for child expenses you are claiming against the other parent (childcare, medical and dental insurance, health-related, educational, post-secondary education, extra-curricular activities).
<input type="checkbox"/>	Parenting After Separation Course Certificate (required if minor children and seeking divorce or applying for court order in Court of Queen’s Bench – as opposed to a common law separation).

If you have received...	then we require:
RRSP/RESP	<input type="checkbox"/> Statements for last 3 months.
Pension	<input type="checkbox"/> Most recent statement, and pension division statement
Term Deposit Certificates	<input type="checkbox"/> Most recent statement.
Guaranteed Investment Certificates (GICs)	<input type="checkbox"/> Most recent statement.
Stocks/Shares	<input type="checkbox"/> Most recent statement.
Any other investment(s)	<input type="checkbox"/> Most recent statement(s)
EI	<input type="checkbox"/> Most recent statement.
Social Assistance	<input type="checkbox"/> Most recent statement.
Worker’s Compensation	<input type="checkbox"/> Most recent statement.
Disability payments	<input type="checkbox"/> Most recent statement.
Student finance	<input type="checkbox"/> Most recent statements for loans, grants, bursaries, scholarships, and educational living allowances.
Business (self-employed, corporation, partnership, farm, rental property, home-based, hobby earning revenue, etc) Note: Your accountant or bookkeeper will likely have many of these documents,	<input type="checkbox"/> Financial Statements for last 3 taxation years.
	<input type="checkbox"/> General Ledger statements for last 3 and current taxation years.
	<input type="checkbox"/> Property, Plant, and Equipment (Amortization) Schedule
	<input type="checkbox"/> Business Expense Statement (I will provide form to you). Supporting receipts, invoices, and other documents also recommended.
	<input type="checkbox"/> Any forms you provided your accountant setting out personal expenses for the last 3 taxation years (e.g. cell phone, vehicle, home office).
	<input type="checkbox"/> If corporation: record of last 12 months of your shareholder’s loan transactions.
	<input type="checkbox"/> Financial Statements from marriage year, prior yr, and cohabitation yr (recommended).
	<input type="checkbox"/> If unincorporated: copies of each cheque issued to you during last 6 weeks from your business or corporation, or from any person or business to which you have rendered a service.
<input type="checkbox"/> If partnership: confirmation of your income and draws from, and capital in, the partnership for the partnership’s last 3 taxation years.	
Trust/beneficiary	<input type="checkbox"/> Copy of Trust Settlement Agreement.
	<input type="checkbox"/> Copies of trust’s last 3 financial statements.
Any other income source	<input type="checkbox"/> Most recent statement.