



**DATE: \_\_\_\_\_**  
**CLIENT INFORMATION INTAKE FORM –**  
**COHABITATION OR MARRIAGE AGREEMENT**  
(to be completed by either one or both parties)

**Your Personal Information:**

First Name:	Middle Name:	Last Name:
Address:		
City:	Postal Code:	
Home phone:	Cell:	
Email address:	Preferred Language:	
Date of Birth:	In Canada since:	How long have you resided at the current address?
Were you married before? YES/NO	Details of prior marriage: date of divorce/death of spouse	
Your surname before marriage:	Your surname at birth:	
Do you wish to change your name? YES / NO	If yes, to what?	
Lawyer Name:		

**Spouse/Partner's Personal Information:**

First Name:	Middle Name:	Last Name:
Address:		
City:	Postal Code:	
Home Phone:	Cell:	
Email Address:	Preferred Language:	
Date of Birth:	In Canada since:	How long have you resided at the current address?
Was your spouse married before? YES/NO	Details of prior marriage: date of divorce/death of spouse	
Spouse's surname before marriage:	Your surname at birth:	
Lawyer Name:		



**Intentions**

1. What is your date of cohabitation? \_\_\_\_\_
2. What is your intended date of marriage if you intend to marry? \_\_\_\_\_

**Previous Cohabitation**

3. Were you married previously? \_\_\_\_\_ Was your spouse married previously? \_\_\_\_\_
4. Were you divorced previously? \_\_\_\_\_ Was your spouse married previously? \_\_\_\_\_

**Children**

5. Do you have children? \_\_\_\_\_ Does your spouse have children? \_\_\_\_\_
6. If yes, what are their names and ages? (please indicate if they are your spouse’s children or your own and whether or not they are financially dependent upon you)

_____	_____
_____	_____
_____	_____

**Employment**

7. What is your occupation and your annual income?  
\_\_\_\_\_
8. What is your spouse’s occupation and annual income?  
\_\_\_\_\_

**Assets (include description and current value)**

9. Real Property:

	<u>Date of Purchase</u>	<u>Price at Purchase</u>	<u>Value Now/Assessment</u>
<b>Yours:</b>	_____	_____	_____
	_____	_____	_____
<b>Your Spouse’s:</b>	_____	_____	_____
	_____	_____	_____



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	<b>Yours:</b>	<b>Your Spouse's:</b>
10. Bank Accounts:	_____	_____
	_____	_____
	_____	_____
11. Investments:	_____	_____
	_____	_____
	_____	_____
12. Pension:	_____	_____
	_____	_____
13. Life Insurance:	_____	_____
	_____	_____
14. Other:	_____	_____
15. Any important information pertaining to the acquisition of assets?		
	_____	_____
	_____	_____
	_____	_____
	_____	_____
16. Were any of the above assets purchased jointly? If yes please give details.		
	_____	_____
	_____	_____
	_____	_____
	_____	_____
17. Are you and your spouse intending to purchase assets jointly?		
	_____	_____

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**Liabilities**

	<u><b>Yours</b></u>	<u><b>Your Spouse's</b></u>
18. Real Property:	_____	_____
	_____	_____
19. Bank Accounts:	_____	_____
	_____	_____
	_____	_____
20. Investments:	_____	_____
	_____	_____
	_____	_____
	_____	_____
21. Credit Cards:	_____	_____
	_____	_____
	_____	_____

22. Any information relevant to the debts, or acquisition of debts?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

23. Are you intending to share debts or enter into joint debt with your spouse?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



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24. Do you and your spouse intend to be financially independent during the relationship?

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**Management of Household Expenses**

25. What is your intention with respect to management of household expenses once you are married or living together?

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**Inheritance**

26. Have you or your spouse received an inheritance, or do you expect to receive an inheritance?

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27. Do either you or your spouse have life insurance and if so are you each other's beneficiaries? If yes provide details.

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**Intentions in Agreement in the event of Separation:**

28. Do you intend to pay spousal support to each other if the relationship ends?

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29. Do you intend to divide property if your relationship ends or will you remain separate as to property?

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30. Will you share the increase in value of your excluded property if the relationship ends?

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31. Will you each be making wills and leaving your assets and estate to your beneficiaries as you see fit?

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32. Is there any other information that you think should be included in your cohabitation agreement?

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33. Please attach the **most recent** copy of the following statements or documents to this questionnaire, if relevant.

- a. **Assessment if you own real property,**
- b. **RRSP**
- c. **Investment account**
- d. **Bank account**
- e. **Credit cards**
- f. **Line of credit**
- g. **mortgage statement**

**Other relevant documents attached – please list**

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