

### **MICHAEL B. KLEINMAN**

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### **CLIENT INTAKE QUESTIONNAIRE**

Thank you for taking the time to complete this form to the best of your abilities.

Please provide additional details or comments wherever appropriate.

Date:	
Your Full Name:	
Spouse's Full Name:	
Spouse's Lawyer's Name:	
I was referred to your office by:	
<u>YOU</u>	
Complete Mailing Address:	
Previous address:	
(If at current address for less than 3 years)	
Phone Numbers	
May we call you at home?	-
(Home):	-
(Work):	_
(Cell):	

Email Addresses	
May we email you?	
E-mail address 1:	
E-mail address 2:	
Social Insurance Number:	
Date of birth:	
Place of birth:	-
Lived in Ontario since:	
Employment	
Employer:	-
Address:	
Title/Occupation:	-
Length of Employment:	
Previous Employment:	-
Income from employment:	_
Income from other sources:	
Are you a member of a pension plan?:	
Please describe your physical and mental health:	

# **YOUR SPOUSE**

My spouse is my (choose one): Husband - Wife - Comn	non Law Partner – Parent of Child
Complete Mailing Address:	
Previous address: (If at current address for less than 3 years)	
Phone Numbers	
(Home):	
(Work):	
(Cell):	
Email Addresses	
E-mail address 1:	
E-mail address 2:	
Social Insurance Number:	
Date of birth:	
Place of birth:	
Lived in Ontario since:	
Employment	
Employer:	
Address:	
Title/Occupation:	

Length of Employment:
Previous Employment:
Income from employment:
Income from other sources:
Is your spouse a member of a pension plan?:
Please describe your spouse's physical and mental health:
RELATIONSHIP
Date of Start of Cohabitation:
Date of Marriage:
Place of Marriage:
Do you have a marriage certificate?
Date of separation:
Is this in dispute?
<u>CHILDREN</u>
1. Child's Full Name:
Date of birth:
Grade and school:
Child's residence / schedule:
Special needs or circumstances:

2.	hild's Full Name:	
	Date of birth:	
	Grade and school:	
	Child's residence / schedule:	
	Special needs or circumstances:	
3.	hild's Full Name:	
	Date of birth:	
	Grade and school:	
	Child's residence / schedule:	
	Special needs or circumstances:	
Are	nere any agencies involved with your children? Please provide details.	
PRI	IOUS RELATIONSHIPS	
If y det	or your spouse was previously married or in a common-law relationship, please provise.	vide

Do you have copies of any previous divorce orders or judgments?
If you or your spouse has children from a previous relationship, please provide details including full names, ages, where they are residing and arrangements for child support:
OTHER INFORMATION
List your and your spouse's life insurance policies, health and medical benefit plans, company benefits, etc.
Have you and your spouse or children ever been involved in a court case? If so, please provide details?
Are you or is your spouse presently in a new relationship with anyone? Please provide details.
Do you and your spouse have any written or verbal agreements dealing with any matter in this case (e.g., prenuptial, marriage, cohabitation or separation agreement)?
Please list any issues that you feel may be contentious and why.
Is there any other information about your case that we should have?

### **CLIENT'S ASSETS**

List all assets (real estate, personal property items, vehicles, bank accounts, RRSPs, investments, pensions, life insurance policies, businesses, etc.). Include one-half of any assets owned jointly. Do not list your spouse's assets here.

Asset	Value on Date of Marriage	Value on Date of Separation	Value Today	Details/Comments
		_		_
		_		

## **CLIENT'S DEBTS**

List all of your debts and liabilities (mortgage, line of credit, loan, credit card, income tax, etc.). Include one-half of any debts for which you are jointly responsible. Do not list your spouse's debts here.

Debt	Value on	Value on	Value Today	Details/Comments
	Marriage	Separation		

### **SPOUSE'S ASSETS**

List all of your spouse's assets (real estate, personal property items, vehicles, bank accounts, RRSPs, investments, pensions, life insurance policies, businesses, etc.). Include one-half of any assets owned jointly. Do not list your assets here.

Asset	Value on	Value on	Value Today	Details/Comments
	Marriage	Separation		

#### **SPOUSE'S DEBTS**

List all of your spouse's debts and liabilities (mortgage, line of credit, loan, credit card, income tax, etc.). Include one-half of any debts for which he or she is jointly responsible. Do not list your debts here.

Debt	Value on	Value on	Value Today	Details/Comments
	Marriage	Separation		