|  |
| --- |
| **MANDATORY DOCUMENTATION Please send to my assistant** |
| ❒ | **Marriage Certificate** (can be obtained from any Motor Vehicle Registry). |
| ❒ | **Photograph** of your Spouse (if filing for divorce). |
| ❒ | **Tax Returns** for last 3 years (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). |
| ❒ | **Notices of Assessment/Reassessment** from CRA for last 3 years. |
| ❒ | **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). |
| ❒ | **Bank Account** Statements and cancelled checks for last 6 months (sole and joint with any other person). |
| ❒ | **Credit Card/LOC** Statements for last 6 months, including department store cards (sole and joint). |
| ❒ | List and receipts for **child expenses** you are claiming against the other parent (in general: child care, medical and dental insurance, health-related, educational, post-secondary education, extra-curricular). |
| ❒ | **Parenting After Separation** Seminar Certificate (required if children under 16 years of age and seeking divorce or applying for court order in Court of Queen’s Bench). |
|  |
| **If you have received…** |  | **then we require:** |
| RRSP/RESP | ❒ | Statements for last 3 months. |
| Pension | ❒ | Most recent statement, and pension division statement |
| Term Deposit Certificates | ❒ | Most recent statement. |
| Guaranteed Investment Certificates (GICs) | ❒ | Most recent statement. |
| Stocks/Shares | ❒ | Most recent statement. |
| Any other investment | ❒ | Most recent statement. |
| EI | ❒ | Most recent statement. |
| Social Assistance | ❒ | Most recent statement. |
| Worker’s Compensation | ❒ | Most recent statement. |
| Disability payments | ❒ | Most recent statement. |
| Student finance | ❒ | 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, however, is it your responsibility to ensure they are disclosed by any deadline.If your Tax Returns or your business’s Financial Statements aren’t up to date, it’s very important that you promptly attend to having them updated.  | ❒ | Financial Statements for last 3 taxation years. |
| ❒ | General Ledger statements for last 3 and current taxation years. |
| ❒ | Property, Plant, and Equipment (Amortization) Schedule |
| ❒ | Statement showing all your salaries, wages, management fees or other payments or benefits for last 3 years (I will provide to you). |
| ❒ | Any forms you provided your accountant setting out personal expenses for the last 3 taxation years (e.g. cell phone, vehicle, home office). |
| ❒ | If corporation: record of last 12 months of your shareholder’s loan transactions. |
| ❒ | Financial Statements from marriage year, prior yr, and cohabitation yr (recommended). |
| ❒ | 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. |
| ❒ | If partnership: confirmation of your income and draws from, and capital in, the partnership for the partnership’s last 3 taxation years. |
| Trust/beneficiary | ❒ | Copy of Trust Settlement Agreement. |
| ❒ | Copies of trust’s last 3 financial statements. |
| Any other income source | ❒ | Most recent statement. |