



| Date _____  | Confidential Client Profile                                   |  |
|---|---|--|
| <u>Client</u>   | <u>Spouse</u>   |  |
| Name:   |   |  |
| Home Address:   |   |  |
| Home Ph #   |   |  |
| Work Ph#  |   |  |
| Cell #:   |   |  |
| E-mail address(ho/wk?):   |   |  |
| Confidential Contact by:  |   |  |
| SIN #:  |   |  |
| D.O.B.:   |   |  |
| Children: 1)  | DOB:  |  |
| 2)  | DOB:  |  |
| 3)  | DOB:  |  |
| 4)  | DOB:  |  |
| Occupation:   |   |  |
| Employer:   |   |  |
| Annual Income:  |   |  |
| Bonus(and formula):   |   |  |
| Wedding Date:   | Separation Date:  |  |
| Separation Agreement in place YES <input type="checkbox"/> NO <input type="checkbox"/>        | Date:   |  |
| Have you retained a lawyer/mediator? YES <input type="checkbox"/> NO <input type="checkbox"/> | YES <input type="checkbox"/> NO <input type="checkbox"/>      |  |
| <b>Contact information</b>  |   |  |
| Name:   |   |  |
| Phone:  |   |  |
| Email:  |   |  |
| <b>Chosen method of negotiating separation</b>  |   |  |
| Face to face negotiation YES <input type="checkbox"/> NO <input type="checkbox"/>             | YES <input type="checkbox"/> NO <input type="checkbox"/>      |  |
| Mediation YES <input type="checkbox"/> NO <input type="checkbox"/>                            | YES <input type="checkbox"/> NO <input type="checkbox"/>      |  |
| Collaborative YES <input type="checkbox"/> NO <input type="checkbox"/>                        | YES <input type="checkbox"/> NO <input type="checkbox"/>      |  |
| Traditional litigation YES <input type="checkbox"/> NO <input type="checkbox"/>               | YES <input type="checkbox"/> NO <input type="checkbox"/>      |  |
| Undecided YES <input type="checkbox"/> NO <input type="checkbox"/>                            | YES <input type="checkbox"/> NO <input type="checkbox"/>      |  |
| Scheduled next Meeting: YES <input type="checkbox"/> NO <input type="checkbox"/> Date         | YES <input type="checkbox"/> NO <input type="checkbox"/> Date |  |
| <b>Other Advisors</b>   |   |  |
| Accountant  |   |  |
| Broker/Financial Advisor  |   |  |
| Other   |   |  |
| Wills?/Last reviewed? YES <input type="checkbox"/> NO <input type="checkbox"/>                | YES <input type="checkbox"/> NO <input type="checkbox"/>      |  |



**Confidential Client Profile**

|                            | <u>Client</u> | <u>Spouse</u> | <u>Joint</u> | <u>Notes</u> |
|----------------------------|---------------|---------------|--------------|--------------|
| <b>Personal Assets</b>     |               |               |              |              |
| Home                       |               |               |              |              |
| Other Real Estate          |               |               |              |              |
| Cars                       |               |               |              |              |
| Jewelry                    |               |               |              |              |
| Furnishings                |               |               |              |              |
| Boats / Toys               |               |               |              |              |
| Other Assets(Collectibles) |               |               |              |              |
| <b>Liquid Assets</b>       |               |               |              |              |
| Savings Account            |               |               |              |              |
| Bonds                      |               |               |              |              |
| Life Ins. Cash Value       |               |               |              |              |
| <b>Investment Assets</b>   |               |               |              |              |
| Bonds                      |               |               |              |              |
| Stocks                     |               |               |              |              |
| Mutual Funds               |               |               |              |              |
| GICs                       |               |               |              |              |
| Stock Options              |               |               |              |              |
| RESPs / ITF                |               |               |              |              |
| Other Securities           |               |               |              |              |
| TSFA                       |               |               |              |              |
| Business Interests         |               |               |              |              |
| <b>Retirement Assets</b>   |               |               |              |              |
| Personal RRSP              |               |               |              |              |
| Spousal RRSP               |               |               |              |              |
| Group RRSP                 |               |               |              |              |
| Employer Pension Plan      |               |               |              |              |
| DPSPs/ESOPs                |               |               |              |              |
| RRIF                       |               |               |              |              |
| <b>Liabilities</b>         |               |               |              |              |
| Mortgage on Home           |               |               |              |              |
| Investment Loans           |               |               |              |              |
| Line of Credit             |               |               |              |              |
| Car Loans                  |               |               |              |              |
| Demand Loans               |               |               |              |              |
| Credit Card Debt           |               |               |              |              |
| Credit Card Debt           |               |               |              |              |
| Taxes                      |               |               |              |              |
| Other(Family Loans)        |               |               |              |              |
| Other Mortgages            |               |               |              |              |



**Confidential Client Profile**

**What stage are you at in the divorce process?**

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**Are you still living together?** YES  NO

**If not, who's living in the marital home?**

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**Explain**

**Do you know what all your marital assets are?** YES  NO

**Do you know what all your current household expenses are?** YES  NO

**Do you track your expenses on a regular basis?** YES  NO

**How do you track your spending?**

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**How do you pay your bills....**

| During your Marriage | Currently | Since Separation |
|----------------------|-----------|------------------|
|                      |           |                  |
|                      |           |                  |
|                      |           |                  |
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**Have you thought about future cash flow needs?**

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**What issues, concerns are you facing currently?**

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**What are your future priorities and goals?**

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**What do you think the problems are in preventing you achieving your goals?**

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**Please describe the services or advice you require from us**

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**How did you hear about Women in Divorce?**

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*Privacy Policy*

*Women in Divorce Financial does not share client information with any other organization or individual unless authority is granted from a client in writing. Due to the personal and confidential nature of information at our disposal, we carefully handle all client information with confidentiality in mind. All conversations between clients and members of our firm are kept confidential and the content of conversations are not disclosed to any other party.*