

Weizman Law

Getting to Know You

Personal Information

Your name: _____

Birthdate: _____ Age: _____

Email address: _____

Citizenship: _____

Marriage/Relationship

Marital/Relationship status: _____

Legal marriage: _____
(Date of current marriage, if applicable)

Common law: _____
(Date started living together, if applicable)

If divorced or separated, provide date:

First spouse: _____ Second spouse: _____

If separated or divorced, do you have a Matrimonial Property Agreement? Yes No

Children:

Do you have any children? Yes No

Child No. 1:

Name: _____ DOB: _____

Address: _____

Marital status: _____ Does this child have children? Yes No

If yes, ages: _____

Is this child adopted? Yes No

Is this child physically or mentally challenged? Yes No

Is this child self-supporting? Yes No

Does this child get along with your other children? Yes No

Is this child from the present or a previous relationship? Yes No

Child No. 2:

Name: _____ DOB: _____

Address: _____

Marital status: _____ Does this child have children? Yes No
If yes, ages: _____

Is this child adopted? Yes No

Is this child physically or mentally challenged? Yes No

Is this child self-supporting? Yes No

Does this child get along with your other children? Yes No

Is this child from the present or a previous relationship? Yes No

Child No. 3:

Name: _____ DOB: _____

Address: _____

Marital status: _____ Does this child have children? Yes No
If yes, ages: _____

Is this child adopted? Yes No

Is this child physically or mentally challenged? Yes No

Is this child self-supporting? Yes No

Does this child get along with your other children? Yes No

Is this child from the present or a previous relationship? Yes No

Grandchildren:

Do you have any grandchildren? Yes No

Do you have any grandchildren who are living with **you and who are financially supporting** that are under the age of 18 years? Yes No

***Only complete if you answered "Yes" to the last two questions.**

Explain and provide particulars of your living arrangements or financial support for your grandchildren: _____

Your investments

Issuer/Bank	Fair Market Value

Your valuable personal property:

Describe any other personal property of value you own (e.g. art, silverware, stamps, mobile homes, boats, heirlooms, etc.)

Description	Location of Property	Approx. Value

Do you have an interest in any assets outside of Canada? Yes No
If your answer is yes, please provide particulars:

Have you made any loans or advances to family members or others that are to be collected or that you wish to be forgiven? Yes No

If your answer is yes, please provide details:

Pensions/Annuities:

Name of Company No. 1: _____

Beneficiary: _____

Does Pension go to Beneficiary on death of Pensioner? Yes No

Name of Company No. 2: _____

Beneficiary: _____

Does Pension go to Beneficiary on death of Pensioner? Yes No

Life insurance policies:

Name of Company	Policy No.	Amount	Beneficiary

Registered retirement savings plans and registered retirement income funds/LIRA:

Financial Institution	Named Beneficiary

Business interests:

Please provide details of any business interests you have:
