

Domestic Contract Matter Intake Form

All intake interviews should be conducted in person and in the presence of the lawyer.

Date: _____ Start time: _____ End time: _____

Our File No.: _____ Type of Legal Proceedings: _____

Client

Name (full legal name): _____

Address: _____

Identity verification

Copy of identification obtained on: _____
(Copy kept in file)

Identification obtained and verified by photo identification:
Passport: _____

Driver's License DL: _____

Citizenship Card: _____

Background

Phone: Home: _____ Cell: _____ Work: _____

Email: _____ (Confirmed with client is confidential)

Date of birth: _____ Age: _____ Place: _____

Employer: _____

Employer address: _____

Position: _____

Length of employ: _____ Annual gross income: _____

Employment history: _____

Social insurance number: _____ Pension plans: _____

Opposing Side

Husband Wife Statutory Common Law Partner Parent of Child of Relationship

Name of individual: _____

Address: _____ Telephone: _____



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Date of birth: _____ Age: _____ Place: _____

Employer: _____

Employer address: _____

Position: _____

Length of employ: _____ Annual gross income: _____

Employment history: _____

Social insurance number: _____ Pension plans: _____

Matrimonial Home

Location: _____ Approximate value: _____

Ownership: Joint Sole _____ Mortgagee: _____

Address of mortgagee: _____

Value of mortgage: _____ Discharge/Renewal date: _____

Separation Details

Date of separation: _____ Place of separation: _____

Details of marriage

Date of marriage: _____ Location: _____ Cohabitation before marriage: _____

Current living arrangements: Living in same home Living separate and apart _____

Information of Wife

Surname at birth: _____ Name at time of marriage: _____

Marital status at time of marriage: _____

If previously married name of former spouse: _____

Date of divorce from former spouse: _____ Place of divorce: _____

Information of Husband

Surname at birth: _____ Name at time of marriage: _____

Marital status at time of marriage: _____

If previously married name of former spouse: _____

Date of divorce from former spouse: _____ Place of divorce: _____

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Children of the Marriage

Name: _____ Date of birth: _____

School attended: _____ Grade level: _____

Child's residence: _____ Length of time child resident: _____

Where are the children living and when do they see the other parent? _____

Current custody arrangement sought: Sole Joint _____

(Visit www.practicepro.ca to download a sheet to list additional Children of the Marriage, if needed.)

Existing Support Arrangements

Spousal frequency: _____ Amount of payment: _____

Child support frequency: _____ Amount of payment: _____

Other

Any previous court actions: No Yes If yes, explain: _____

Domestic contract: No Yes If yes, explain: _____

Income

Gross weekly pay: _____ Regular wage: _____ Overtime pay: _____

C.P.P.: _____ U.I.C.: _____ Union dues: _____

Disability: _____ Automatic deductions: _____ Pension: _____

Other: _____

Assets

Vehicles: (1) _____ (2) _____

Works of art: _____ Jewellery: _____

Contents of home: _____

Bank accounts: _____ Securities/RRSPs: _____

Life insurance: _____ Other: _____

Debts

(1) _____

(2) _____

(3) _____

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Deadlines

Applicable limitation periods:

Other crucial deadlines:

Parenting Affidavit Information

1. Other names used during lifetime:

2. The child(ren) in this case is/are:

Child's full legal name:

Birthdate (d/m/y):

Age:

Full name of parents (if different from intake information):

Name(s) of all people the child lives with now (include addresses if the child does not live with you):

My relationship to the child (specify if parent, grandparent, family friend, etc.):

3. I am also the parent of or have acted as a parent (for example, as a step-parent, legal guardian etc.) to the following child(ren): (include the full legal names and birthdates of any child(ren) not already listed in paragraph 2)

4. I am or have been a party in the following court case(s) involving custody of or access to any child: (Including the child(ren) in this case or any other child(ren). Do not include cases involving a children's aid society in this section. Attach a copy of any custody or access court order(s) or endorsement(s) you have.)

Court location:

Names of people involved in the case:

Names of children:

Court orders made (include dates of orders):

5. I have been a party or person responsible for the care of a child in the following child protection court case(s): (attach a copy of any relevant court order(s) or endorsement(s) you have)

Court location:

Names of people involved in the case:

Name of Children's Aid Society:

Court orders made (include dates of orders):

6. I have been found guilty of the following criminal offence(s) for which I have not received a pardon:

Charge:

Approximate date of finding of guilt:

Sentence received:



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7. I am now charged with the following criminal offence(s):

Charge:

Date of next court appearance:

Terms of release while waiting for trial: (attach copy of bail or other release conditions, if any)

8. To the best of my knowledge, since birth, the child(ren) in this case has/have lived with the following caregiver(s):

9. The child(ren) does not/do not have any special medical, educational, mental health or developmental needs.
 The child or one or more of the children has/have the following special needs and will receive support and services for those needs as follows: (if a child does not have special needs, you do not have to include information about that child below)

Medical:

Educational:

Mental Health:

Developmental:

Other:

Other toolkits and checklists to help minimize risk

LAWPRO resources

ILA Checklist: When providing independent legal advice, this checklist provides you with a handy tool to ensure that you are covering all the bases when discussing the underlying transaction and your client's relationship to that transaction: www.practicepro.ca/ILAChecklist

Non-profit Board Risk Management Checklist: Here are some questions you should ask yourself before serving as a director on the board of a charity or not-for-profit organization: www.practicepro.ca/nonprofit

Vulnerabilities Assessment Chart: Use this chart to help identify and assess your firm's vulnerabilities: www.practicepro.ca/disastercoverage

Employee Departure Checklist: A list of security-related steps you should take when an employee leaves your firm: www.practicepro.ca/EmployeeDeparture

LAWPRO's practicePRO website also has links to numerous resources to help lawyers address a wide variety of practice issues – including sample retainers, a limitations period summary chart and sample generic policies that you can adapt on topics such as law firm privacy. Check them out on the practicePRO practice aids page at www.practicepro.ca/practice/default.asp

TitlePLUS resources

The TitlePLUS website provides lawyers with a number of sample documents (retainer agreements, reporting letters)

that can be easily adapted for specific transactions. Check them out at www.titleplus.ca/resources

Other checklists

CBA Conflicts of Interest Toolkit: A great resource of conflicts related checklists and precedents: www.cba.org/CBA/groups/conflicts/toolkit.aspx

Law Society Lawyer Basic Management Checklist: A practice analysis tool which assists in identifying possible deficiencies in your practice: rc.lsuc.on.ca/jsp/pmg/executiveSummary.jsp