



## INFORMATION AND DOCUMENT CHECKLIST

Please collect and make copies of the following information and documents if they apply to you.  
Your spouse will need to do the same.

Today's date:

Date of separation:

### Insurance:

- Insurance policies (whole life, term life, disability, critical illness)—current and at date of separation
- Cash surrender value statement for whole life insurance or universal life policies

### Investments:

- Registered and non-registered savings plans (RRSPs, RIFs), etc. Term Deposits, Canada Savings Bonds, brokerage statements, stock options and statements from any other investments—current and at the date of separation)

### Employment, pay and benefits:

- Pay stubs or other proof of income for the past three months
- Employment contract(s), employment agreement(s) and employee benefit information
- Current employment pension plan statement and pension valuation report

### Tax returns:

- Tax returns for the last three years, including T4s, T5s and Notices of Assessment
- Corporate financial statements, corporate tax returns and Notices of Assessment for the past three years and corporate bank statements for the past six months



---

### Banking and finances:

- Bank statements for the last six months (chequing and savings)—current and at date of separation
- Copy of any net worth statement you provided to your bank or other financial institution during the last three years
- Your estimated budget and special expenses

### Other assets:

- Copy of title to the house(s) and any other property owned
- Copy of appraisal for the house(s)
- List of content in safety deposit
- List of vehicles with appraisals
- Jewelry and art appraisals

### Debts:

- Loan, line of credit and mortgage statement—current and at date of separation)
- Loan applications (if any)
- All personal guarantees you have signed
- Credit card statements for all credit cards—current and at date of separation)

### Marriage and family:

- Government issued marriage certificate
- Any court papers related to your marriage or family
- Special expenses for your child(ren)
- Any information about assets, debts or property you owned before you got married