

## CLIENT INTAKE FORM

<b>Your Personal Information</b>		
<i>First Name:</i>	<i>Middle Name:</i>	<i>Last Name:</i>
<i>Address:</i>		
<i>City:</i>	<i>Postal Code:</i>	
<i>Home Phone:</i>	<i>Cell:</i>	
<i>E-Mail Address:</i>		
<i>Date of Birth:</i>	<i>Place of Birth:</i>	<i>In BC since:</i>
<i>Your last name at birth:</i>		<i>Your last name before your marriage:</i>
<i>Have you been married more than once?</i>		<i>Details of prior marriage:</i>
<i>Do you wish to change your name?</i>		<i>If yes, to what?</i>

<b>Partner's Personal Information</b>		
<i>First Name:</i>	<i>Middle Name:</i>	<i>Last Name:</i>
<i>Address:</i>		
<i>City:</i>	<i>Postal Code:</i>	
<i>Home Phone:</i>	<i>Cell:</i>	
<i>E-Mail Address:</i>		
<i>Date of Birth:</i>	<i>Place of Birth:</i>	<i>In BC since:</i>
<i>Partner's last name at birth:</i>		<i>Partner's last name before marriage:</i>
<i>Has your partner been married more than once?</i>		<i>Details of prior marriage:</i>
<i>Notes:</i>		

<b>Children of the Relationship</b>			
<b>Child #1</b>			
<i>First Name:</i>	<i>Middle Name:</i>	<i>Last Name:</i>	
<i>Date of Birth:</i>		<i>Age:</i>	
<i>Place of Birth:</i>		<i>Resident of BC Since:</i>	
<i>School:</i>		<i>Grade:</i>	
<i>Child Resides With:</i>			
<b>Child #2</b>			
<i>First Name:</i>	<i>Middle Name:</i>	<i>Last Name:</i>	
<i>Date of Birth:</i>		<i>Age:</i>	
<i>Place of Birth:</i>		<i>Resident of BC Since:</i>	
<i>School:</i>		<i>Grade:</i>	
<i>Child Resides With:</i>			
<b>Child #3</b>			
<i>First Name:</i>	<i>Middle Name:</i>	<i>Last Name:</i>	
<i>Date of Birth:</i>		<i>Age:</i>	
<i>Place of Birth:</i>		<i>Resident of BC Since:</i>	
<i>School:</i>		<i>Grade:</i>	
<i>Child Resides With:</i>			

<b>Children From Other Relationships</b>			
<i>Name of Child</i>	<i>Date of Birth</i>	<i>Place of Birth</i>	<i>School/Grade</i>

<b>Your Relationship Information</b>		
<i>Date of Cohabitation:</i>	<i>Date of Marriage:</i>	<i>Date of Separation:</i>
<i>Place of Marriage:</i>		<i>Date of Divorce:</i>
<i>Is there a possibility of reconciliation?</i>		<i>Is there a separation agreement in place?</i>
<i>Is there any verbal agreement in place?</i>		<i>Can you provide the original marriage certificate?</i>

<b>Children's Information</b>	
<i>Citizenship of the children:</i>	<i>Do children have passports?</i>
<i>Is there conflict about parenting the children?</i>	
<i>Daycare arrangements and costs:</i>	
<i>Significant medical concerns of children:</i>	
<i>Children's doctor:</i>	
<i>Do children have any assets, trust property, bank accounts, or similar? If yes, please list.</i>	

<b>Your Employment and Income</b>	
<i>Your Education:</i>	
<i>Employer:</i>	<i>Position:</i>
<i>Address:</i>	<i>Phone:</i>
<i>Date of Commencement:</i>	<i>Annual Gross Income:</i>
<i>Relevant Past Employment:</i>	
<i>Other Income (social assistance, dividends, pensions, child tax credits, maintenance):</i>	

<b>Partner's Employment and Income</b>	
<i>Education:</i>	
<i>Employer:</i>	<i>Position:</i>
<i>Address:</i>	<i>Phone:</i>
<i>Date of Commencement:</i>	<i>Annual Gross Income:</i>
<i>Relevant Past Employment:</i>	
<i>Other Income (social assistance, dividends, pensions, child tax credits, maintenance):</i>	

<b>Vehicles</b>		
<i>Make:</i>	<i>Model:</i>	<i>Year:</i>
<i>Registered Owner:</i>		
<i>Make:</i>	<i>Model:</i>	<i>Year:</i>
<i>Registered Owner:</i>		
<i>Make:</i>	<i>Model:</i>	<i>Year:</i>
<i>Registered Owner:</i>		

<b>Savings, Chequing and Financial Accounts</b>		
<i>Institution and Account Type</i>	<i>Account Holder(s)</i>	<i>Balance</i>

<b>Real Property</b>	
<i>Family Home Address:</i>	
<i>Date of Purchase:</i>	<i>Estimated Value:</i>
<i>Registered Owner:</i>	<i>Mortgage Holder:</i>
<i>Mortgage Balance:</i>	<i>Monthly Mortgage Payments:</i>
<i>Annual Taxes:</i>	<i>Annual Utilities Rate:</i>
<i>Tenant Name(s):</i>	<i>Rental Income:</i>
<i>Notes:</i>	
<i>Other Real Property or Valuables in Excess of \$5,000.00:</i>	

<b>Insurance Policies, RRSPs, Employment Pensions and CPP</b>		
<i>Policy or Account Type</i>	<i>Holder</i>	<i>Balance or Value</i>
<i>Other investments, stocks, bonds or commodities:</i>		

**FAMILY AND PERSONAL DEBTS**

<b>Credit, Financial Institution or Retailer Accounts</b>		
<i><u>Account or Credit Card</u></i>	<i><u>Holder</u></i>	<i><u>Balance Owing</u></i>
<i>Other loans or debts (aside from listed mortgages):</i>		
<i>Other significant debts, including personal guarantees and loans for which you have co-signed:</i>		

**Identification**

*Please be ready to provide two pieces of valid original identification. We will need photocopies of two of these for our records.*

- Driver's License
- Passport
- Government Issued ID Card (with photo and signature)
- Canadian Citizenship/Naturalization Card
- Policy/Military ID Card
- Permanent Resident Card
- Birth Certificate
- Social Security Card
- Provincial or Territorial Health Insurance Card
- Credit Card
- Old Age Security Card

**OFFICE USE ONLY**

- |   |                                    |  |
|---|------------------------------------|--|
| <input type="checkbox"/> Website                | <input type="checkbox"/> Legal Aid | <input type="checkbox"/> CBA Lawyer Referral |
| <input type="checkbox"/> Friend/Relative        | <input type="checkbox"/> SYKES     | <input type="checkbox"/> Staff Member        |
| <input type="checkbox"/> Existing/Former Client | <input type="checkbox"/> Lawyer    | <input type="checkbox"/> Other               |

Retainer: \_\_\_\_\_

Special Quotation: \_\_\_\_\_

Opposing Counsel: \_\_\_\_\_

Credit Card for Billing: \_\_\_\_\_