

CLIENT INTAKE FORM
FOR
RELATIONSHIP/MARRIAGE CONTRACTS

• **YOUR INFORMATION:**

Full name (first, middle, last): _____

Phone Number: _____ / Email Address: _____

Current address, with postal code: _____

Date of Birth (MM/DD/YYYY): _____

Place of Birth (city, province, country): _____

Occupation & Employer: _____

Annual Gross Income: \$ _____

• **YOUR SPOUSE'S INFORMATION:**

Full name (first, middle, last): _____

Phone Number: _____ / Email Address: _____

Current address, with postal code: _____

Date of Birth (MM/DD/YYYY): _____

Place of Birth (city, province, country): _____

Occupation & Employer: _____

Annual Gross Income: \$ _____

• **INFORMATION ON RELATIONSHIP:**

When did your relationship begin (MM/DD/YYYY): _____

Date of Marriage (MM/DD/YYYY): _____

Place of Marriage (city, province, country): _____

Do you plan on getting married to your partner, if so, when? _____

PURPOSE OF THE AGREEMENT:

What are your primary goals or concerns that prompted you to seek this agreement (*Examples: financial clarity, asset protection, estate planning, protection for children from previous relationships, business protection*)? _____

• **PROPERTY & FINANCIAL ASPECTS:**

Please complete the following to help us reflect your intentions in the agreement.

1. **Protecting Assets Owned Before the Relationship.**

Are you seeking to protect any premarital property, business interests, or future entitlements (examples: inheritance, sale of property or business, settlement claims, life insurance, expected compensation/payout)? ☐ Yes ☐ No

*If yes, please provide a description and details for each: _____

2. **Inheritances and Gifts Received During the Relationship.** How should these be treated?

☐ Remain separate property

☐ Convert to joint property

☐ Agreed upon arrangement (please specify): _____

3. **Allocation of Assets.** How should current and future assets accumulated be handled?

Please specify any agreements regarding division of assets and indicate which assets should remain separate, and which would be shared (examples: bank accounts, vehicles, real estate, RRSPs, pensions): _____

4. **Allocation of Debts.** How should current and future debts incurred be handled?

Please specify any agreements regarding division of liabilities (which would remain separate, and which would be shared): _____

• **THE FAMILY HOME:**

5. **Where is the current or intended shared residence, and is the property rented or owned?**

If owned, under whose name is the property registered?

☐ Me ☐ My spouse ☐ Joint ☐ Other: _____

6. **Will ownership change after marriage?** ☐ Yes ☐ No

If yes, solely by one spouse, jointly, or in-trust? _____

7. **How will contributions to the down payment, mortgage payments, and improvements be treated** (example: Jointly 50/50, solely by one party, as agreed upon, or other)?

8. **If one spouse contributes more financially, how will their equity be protected?**

(will each person own part of the property based on what they paid, or will they both own it equally and settle the difference later with reimbursements, or other?)

9. **Who is responsible for mortgage payments, property taxes, utilities, insurance, and maintenance costs?**

☐ Me ☐ My spouse ☐ Joint ☐ Other: _____

10. **How will appreciation or depreciation in home value during the relationship/marriage be addressed upon separation?**

☐ Shared equally

☐ Proportional to contribution

☐ Excluded entirely

☐ Other: _____

11. **What will take place upon separation?**

☐ One party remains in the home

☐ Vacate within a specified timeline or on notice

☐ Sell or transfer the home

☐ Other (please explain): _____

12. In case of separation, does either spouse have a buyout option or right of first refusal? And would there be any specific terms and timelines for exercising these rights?

13. Will this clause apply to future primary residences or only to the current family home?

☐ Yes

☐ No

☐ Other: _____

• **SPOUSAL SUPPORT:**

14. Do you anticipate either party will support the other financially, or will both maintain separate finances? _____

15. Do you wish to address spousal support in the agreement? Yes [] / No []

**If yes, under what conditions or terms?*

☐ Waived by both parties

☐ Payable under defined terms (please describe): _____

☐ Limited by amount or duration

☐ To be determined at time of separation

• **CHILDREN OF THE MARRIAGE/RELATIONSHIP:**

16. Do you have children together? ☐ Yes ☐ No **If yes, list names and dates of birth:*

Child #1

Full legal name of child: _____

Date of Birth (MM/DD/YYYY): _____

Child #2

Full legal name of child: _____

Date of Birth (MM/DD/YYYY): _____

Child #3

Full legal name of child: _____

Date of Birth (MM/DD/YYYY): _____

**If you have more than 3 children, please add additional details on a separate sheet.*

Parenting & Financial Information:

17. Does either party have children from a previous relationship? I do ☐ / My partner ☐ / No ☐

**If yes, provide the following:*

a) Legal name & date of birth: _____

b) Is child support payable or received? Provide details: _____

c) Would the non-biological parent have any financial or custody arrangements of such children in the event of separation? _____

18. Is either party currently paying or receiving **spousal support** from a prior relationship?

☐ Yes ☐ No **If yes, please provide details:* _____

• **ADDITIONAL INFORMATION:**

19. Is there a specific timeline or deadline by which you need the agreement completed?

☐ Yes ☐ No **If you answered yes, provide details:* _____

20. How would you be paying for our services (credit card [], e-transfer [], cash [], or debit [])?

Who can the invoice be payable to, or split 50/50? _____

21. How did you hear about **Divorce Easy**? _____

ADDITIONAL INFORMATION YOU WOULD LIKE TO PROVIDE TO DIVORCE EASY:

