



Lindsay Kenney LLP  
Barristers & Solicitors  
Founded in 1980

## Instructions to Complete Financial Statement Form

### Page 2

**#2** - Do you anticipate a change to your financial situation? If yes, please explain. For example, do you have a short-term job and your income will end in a month, or will you be moving to a more expensive place, etc.?

### Page 3

#### Part 1 – Income

**A** - Fill in your employer information.

**B** – Please bring copies of:

- your income tax returns, with attachments, for the three most recent taxation years
- your Notices of Assessment or Reassessment for the three most recent taxation years
- your three most recent income receipts (pay stubs) showing year-to-date income
- current property assessments for any property you have an interest in
  
- if you run a business, please provide copies of your corporate income tax returns for the three most recent taxation years, and
- the corporate financial statements for the three most recent taxation years

### Page 4

#### C. Annual Income

- **Line 1** – If you are an employee, fill out your income in line 1.
- **Line 9** – subtract any annual union or professional dues (annual \$)
- **Line 12** – add any spousal support you *receive* (annual \$)
- **Line 13** – set out any spousal support you *pay* to your spouse (annual \$)
- **Line 14** – add any UCCB (Universal Child Care Benefit) you receive (annual \$)
- **Line 16** – fill in any child support you receive (annual \$)
- **Line 18** - fill in your Child Tax Benefits and BC Family Bonus received (annual \$)  
(Fill in any other income you might receive on any of the other lines on page 3; we have only set out the common income sources)

### Page 5

#### Schedule A – Other Income

Fill in any other income, including

- **Line 1** - self-employment income (gross and net)
- **Line 2** - Other employment income
- **Line 4** - Rental income (gross and net)

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## Pages 6 and 7

### Part 2 – Expenses

Fill in your *monthly* expenses on these pages.

## Page 8

### Part 3 – Property – Assets

Fill in all assets in your and your spouse's name, and identify whose name is on what asset (eg. your name, your spouse's name, or joint). For bank accounts, provide need the institution name, the account number, the balance and the date of the balance.

For example: CIBC Chequing Acct. #123456 (My name), as of September 30, 2013 = \$3,265.21

If the account is your spouse's, it's okay to put "unknown" for the account number or the balance, but you can estimate. If you estimate, use the word "estimate".

## Page 9 – Debts

List out all your debts in either your name, your spouse's name, or joint names, the institution names, the account numbers where available, whose name the debt is in, the balance owing and the date of the balance.

For credit cards, make sure you identify whose credit card it is. If it's a card you pay off monthly, use the word "current" as the balance.

## Page 9 – Disposal of Property

List any significant assets sold by either you or your spouse in the past two years, with as much detail as you can.

## Pages 9, 10, 11

### Part 4 – Special or Extraordinary Expenses

Use one table per child and list expenses for each.

- Fill in one column only - either annual gross, annual net, monthly gross or monthly net, you don't have to fill out all of the columns.

## Page 10

### Part 5 – Undue hardship

Fill in this section if applies to your situation

### Part 6 – Income of other persons in household

Fill in the name and annual income of any other person living in your home and sharing expenses with you.

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## Documents Required:

Please provide copies of the following documents, to attach to the Financial Statement:

- your income tax returns, with attachments, for the three most recent taxation years
- your Notices of Assessment or Reassessment from CRA for the three most recent taxation years
- your three most recent income receipts (pay stubs) showing year-to-date income
- current property assessments for any property you have an interest in

If you run a business, please provide copies of:

- T2 Corporation Income Tax Returns for the three most recent taxation years
- the corporate Financial Statements for the three most recent year-ends

Please also provide copies of:

- current RRSP statements
- current investment account statements

## Lindsay Kenney LLP Family and Matrimonial Law and Litigation

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