



Lindsay Kenney LLP
Barristers & Solicitors
Founded in 1980

Cohabitation / Marriage Agreement Questionnaire

Your Name: _____

Age _____

Divorced / never married / widowed? _____

Any children?

If yes, provide names, ages, and living situation

Job title _____

Annual income _____

Your Assets

The purpose of the agreement is to record what assets you own at the outset of the relationship, and clarify that those assets will remain yours throughout the relationship and if the relationship ends. It is also to document inheritances or gifts or personal injury settlements or any other source of monies you may receive or have already received which you wish to keep separate. The more details you can provide, the better. If any of these assets are held in joint names, either with you and your partner or you and a third party, please describe.

We are acting for you, so it is recommended that you to collect copies of your current account statements, or any documents you have attesting to the current value of your assets, and provide us with copies. We will keep an originally signed copy of your cohab agreement with copies of the statements in our vault, in case there is ever a question of proving values.

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Bank Accounts / Investment Accounts

(Note: we require the name of the bank, the account number, the type of account (chequing, savings, etc.), the balance and the date of the balance.)

eg., RBC / savings account / #1234560 / balance = \$5,000 as of March 1, 2018

Name of Bank _____

Account No. _____

Type of Account _____

Balance _____

Date _____

Name of Bank _____

Account No. _____

Type of Account _____

Balance _____

Date _____

If you have an account from which you pay your bills, and there is a moving balance, an estimate of the balance as at a certain date is fine.

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RRSP Accounts / Company Pensions

Eg., BMO RRSP account #123477 with a balance of \$15,000 as of June 3, 2018.

Name _____

RSP Account No. _____

Balance _____

Date _____

Name _____

RSP Account No. _____

Balance _____

Date _____

Automobiles / motorcycles / boats

Real Estate

Note: Use the current assessment values or appraisal values.

Address _____

Value _____

Address 2 _____

Value 2 _____

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Any other assets you have that you want to keep separate

eg., antique desk from grandpa, fancy road bike, Rolex watch, etc. or money owing to you from someone else.

Your Debts

Please provide details about all your debts, such as mortgages, lines of credit, personal loans, car loans, credit cards, etc.

For all of them, provide the name of the institution (or person you owe), the balance owing, and the date of the balance.

Mortgage

Institution _____

Balance Owing _____

As of Date _____

Line of Credit

Institution _____

Balance Owing _____

As of Date _____

Loan

Institution _____

Balance Owing _____

As of Date _____

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Credit Card

Institution

Balance Owing

As of Date

Credit Card

Institution

Balance Owing

As of Date

Credit Card

Institution

Balance Owing

As of Date

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Partner's Name _____

Age _____

Divorced / never married / widowed? _____

Any children?

If yes, provide names, ages, and living situation

Job title _____

Annual income _____

Partner's Assets

Partner's Bank accounts / Investment accounts

(Note: please provide the name of the bank, the account number, the type of account (chequing, savings, etc.), the balance and the date of the balance.)

eg., RBC / savings account / #1234560 / balance = \$5,000 as of March 1, 2018

Name of Bank _____

Account No. _____

Type of Account _____

Balance _____

Date _____

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Name of Bank _____

Account No. _____

Type of Account _____

Balance _____

Date _____

If you have an account from which you pay your bills, and there is a moving balance, an estimate of the balance as at a certain date is fine.

Partner's RRSP accounts / Company pensions

eg., BMO RRSP account #123477 with a balance of \$15,000 as of June 3, 2018.

Name _____

RSP Account No. _____

Balance _____

Date _____

Name _____

RSP Account No. _____

Balance _____

Date _____

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Partner's Automobiles / motorcycles / boats

Partner's Real estate

Note: Use the current assessment values or appraisal values.

Address _____

Value _____

Address 2 _____

Value 2 _____

Any other assets you have that you want to keep separate

Eg., antique desk from grandpa, fancy road bike, Rolex watch, etc. or money owing to you from someone else.

Partner's Debts

Please provide all details about all your debts, such as mortgages, lines of credit, personal loans, car loans, credit cards, etc.

For all of them, provide the name of the institution (or person you owe), the balance owing, and the date of the balance.

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Mortgage

Institution _____

Balance Owing _____

As of Date _____

Line of Credit

Institution _____

Balance Owing _____

As of Date _____

Loan

Institution _____

Balance Owing _____

As of Date _____

Credit Card

Institution _____

Balance Owing _____

As of Date _____

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Credit Card

Institution _____

Balance Owing _____

As of Date _____

Credit Card

Institution _____

Balance Owing _____

As of Date _____

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Joint Assets

If you and your partner own anything in joint names, such as a joint bank account, or have any joint debts, please provide the details with account numbers, balances, etc.

Name _____

RSP Account No. _____

Balance _____

Date _____

Name _____

RSP Account No. _____

Balance _____

Date _____

Joint Debts

Mortgage

Institution _____

Balance Owing _____

As of Date _____

Line of Credit

Institution _____

Balance Owing _____

As of Date _____

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Loan

Institution _____

Balance Owing _____

As of Date _____

Credit Card

Institution _____

Balance Owing _____

As of Date _____

Credit Card

Institution _____

Balance Owing _____

As of Date _____

Credit Card

Institution _____

Balance Owing _____

As of Date _____

Credit Card

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As of Date _____

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The Relationship

Are you currently living together? If yes, when did that commence?

No Yes

Since _____

Are you planning to move in together? If yes, around what date?

No Yes

When _____

Are you planning to eventually marry?

No Yes

When _____

Lindsay Kenney LLP
Family Law Group

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