**3** Post-meeting Client

Assignment form

Client Name: Meeting date:

Your immediate attention to these tasks will assist us in moving your matter along.

Please contact

at or if you have any questions.

Please bring the following items ON OR BEFORE: (insert date)

❏ Retainer in the amount of $

❏ My hourly rate is $ . My law clerk is charged out at $ per hour.

❏ The Retainer Agreement must be signed prior to the commencement of any legal services.

❏ Income Tax Returns and Notices of Assessment/Reassessments for the following years:

These may be ordered by calling Canada Revenue Agency at 1-800-959-8281

PLEASE CALL IMMEDIATELY AS IT TAKES 2 WEEKS MINIMUM TO RECEIVE

THESE DOCUMENTS AND THE COURT PROCESS CANNOT BE STARTED WITHOUT THEM.

❏ Any corporate financial statements for the last three year period

❏ The original marriage certificate or make a request to obtain your original marriage certificate

If you are married in Canada this can be obtained on line at [http://www.forms.ssb.gov.on.ca/mbs/ssb/forms/ssbforms.nsf/GetFileAttach/007-11078E~1/$File/11078E.pdf](http://www.forms.ssb.gov.on.ca/mbs/ssb/forms/ssbforms.nsf/GetFileAttach/007-11078E~1/%24File/11078E.pdf)

❏ A copy of your current pay stubs (always updated when you have an appointment)

❏ Completed draft Financial Statement (please note that there is no need to total)

This form must be completed in its entirety. Do not just say see attached documents

❏ Most recent pension statement:

❏ Any Deed or Mortgage documents for any real property

❏ Please obtain a copy of any bank statements confirming your accounts for the date of marriage and the date of separation.

Bank Statements to be provided

❏ A copy of any properties of attorney for personal care or property

❏ A copy of your most recent Last Will & Testament

❏ A copy of all current Orders of the Court and any Minutes of Settlement

❏ A copy of any Domestic Contract signed by your client

❏ Ministry of Transportation Sale Package on any vehicle registered in your name

❏ Credit bureau disclosure to ascertain any asset or debt obligations you may not be aware of

❏ Any supporting documents confirming the existence of a premarital deduction claim

❏ Additional Documents

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