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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/$File/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 _____