



Lawyer/Client Expectations

Thank-you for retaining my services. In our consultation I may have given you some indicators as to what you can expect of me as your lawyer – but I take this opportunity to review it in a little more detail in order to make our relationship work as well as possible.

My role as your lawyer is to provide both practical and legal advice, discuss your options and responsibilities, assist in negotiations and advocate for your interests. If litigation becomes necessary, I can represent you in court and help you through that process.

As a family law lawyer, I have more requests for my work than I can accept. There is also a limit to the number of hours I am able to work each week for the benefit of my family as well as my own sanity! I have as many as 120 files on the go at any point in time. I do not have a lot of control over how many of my files are active at any given moment. There will be days and sometimes weeks where I am out of the office or simply unavailable due to my work load. This limits my ability to respond to calls and emails as quickly as I would like. Prioritizing work is one of the biggest challenges for a family law lawyer. For example, at times, children or property in need of protection will rise to the top of the priority list. This may work in your favour if your matter is the one in need of immediate attention or it may mean a delay for you if I am dealing with someone else's emergency. If your matter is truly urgent, contact my assistant and she will do her best to ensure that I respond promptly.

Many clients are interested in what they can do to keep legal fees manageable. The most effective things you can do in this regard is to be available for meetings, be accessible by phone or email, organize your financial information and provide it promptly, be open to new ideas and take a problem-solving approach as opposed to an approach that is based on assigning blame. Since I charge by tenths of an hour, keep in mind that a five-minute call or an email will likely be charged as a .1 of an hour. Don't be afraid to communicate, but keep the cost in mind.

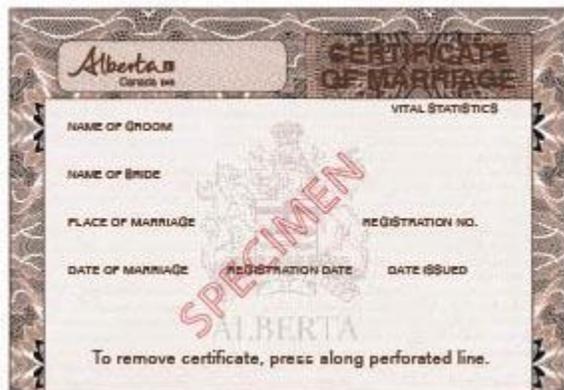
Lastly, my value to you is as a trusted advisor who has knowledge and expertise you do not and whose judgement is not clouded by being too close to the people or events. This may create the appearance at times of someone who is objective or even dispassionate, but in reality it is simply a necessary professional distance. My goal is to ensure that you are supported and empowered to make the best possible decisions under all of the circumstances. I look forward to working with you.



Help us help you

Providing us with the following will ensure we can move your file ahead with fewer obstacles. We understand this may be time consuming but we do require the information to assist in the process. Both parties are required to provide/exchange the same financial disclosure that applies to them and we will be requesting same from the other party.

1. A signed Retainer Agreement (please email us to request a copy).
2. A recent photograph of your spouse. The photo is required to attach as an Exhibit to the Affidavit of Personal Service.
3. Your Marriage Certificate as issued by the Province where you were married. Certificates issued by a Church or other officiate, or your marriage license will not suffice. **If you were married in Alberta** your certificate looks like this:



If you don't have one you can find the order form here:

<http://www.servicealberta.gov.ab.ca/Marriage-certificates-how-to-apply.cfm> Feel free to put our address in the c/o section so the certificate will come straight to our office. You must take the form in person to your nearest Motor Vehicles Branch and they will assist you in placing an order.

If you were married in a Province other than Alberta or in the U.S. you can generally find the forms online but if you have any difficulty, we can assist.

If you were married outside of Canada, you must try to obtain a Marriage Certificate issued from a government office. If that is not possible, any documentation such as a marriage license or Church register of some sort may suffice but we will need the name of the officiate and the name of two witnesses if that information is not included on the documentation provided.

4. **Your Certificate from the Parenting after Separation course**

Parenting After Separation is a six-hour seminar when taken in person or approximately a 3 hour eCourse. PAS offers information to parents about the separation and divorce process, the effects of separation and divorce on children, techniques for communication and legal information that affects parents and children. The on-line registration page can be found at: pas.albertacourts.ab.ca. You will be issued a certificate once you have completed it. Forward the certificate by email or bring in a copy and we can file it with the courts.

To attend an in-person workshop – go to <https://www.the-family-centre.com/workshops/parenting-after-separation/> to access times/locations where the course is being offered.

5. **Your Disclosure**

If there are children of the marriage or if spousal support is being sought, we will require some financial information from you. We have included a Notice to Disclose form which lists the items you must provide. It is important to note that we are not able to serve a Notice to Disclose on the other party without providing your disclosure with it. So the sooner we receive your disclosure the sooner we get the ball rolling. Sending your disclosure to us electronically is preferable if you have the ability to do that.

6. **A Timeline** (aka “History Lesson”)

This can be simple and done in point form and should include the following:

- Where you lived through out the relationship
- Where you worked during the relationship
- Roles each party had (ie stay at home parent)
- Time that either party took off work
- Any changes of employment that resulted in relocation
- History of your partner’s employment including time working away, changes of position or promotions
- Education that either party obtained both prior to relationship and during
- Any significant medical issues for either party or any of the children
- Criminal charges or police involvement

Financial Disclosure required:

1. A copy of every personal income tax return you have filed for each of the 3 most recent taxation years. If you have not filed a tax return for the previous year, you must provide copies of your T4, T4A, and all other relevant tax slips and statements disclosing any and all sources of income for the previous year.
2. A copy of every notice of assessment and reassessment issued to you for each of the 3 most recent taxation years, or a copy of the Canada Revenue Agency printout of your last 3 years' income tax returns.
3. If you are an employee, a copy of each of your 3 most recent statements of earnings indicating your total earnings paid in the year to date, including overtime, or where such a statement is not provided by your employer, a letter from your employer setting out that information, including your rate of annual salary or remuneration.
4. If you receive income from employment insurance, social assistance, a pension, workers' compensation, disability payments, dividends or any other source, the most recent statement of income indicating the total amount of income from the applicable source during the current year or, if such a statement is not provided, a letter from the appropriate authority stating the required information.
5. If you are a student, a statement indicating the total amount of student funding you have received during the current academic year, including loans, grants, bursaries, scholarships and living allowances.
6. If you are self-employed in an unincorporated business:
 - a. particulars or copies of every cheque issued to you during the last 6 weeks from any business or corporation in which you have an interest, or to which you have rendered a service;
 - b. the financial statements of your business or professional practice for the 3 most recent taxation years; and
 - c. a statement showing a breakdown of all salaries, wages, management fees or other payments or benefits paid to yourself, or to persons or corporations with whom you do not deal at arm's length, for the 3 most recent taxation years.
7. If you are a partner in a partnership, confirmation of your income and draws from, and capital in, the partnership for its 3 most recent taxation years.
8. If you have a 1% or more interest in a privately held corporation:
 - a. the financial statements of the corporation and its subsidiaries for its 3 most recent taxation years;
 - b. a statement showing a breakdown of all salaries, wages, management fees or other payments or benefits paid to yourself, or to persons or corporations with whom the corporation, and every related corporation, does not deal at arm's length for the corporation's 3 most recent taxation

years; and

- c. a record showing your shareholder's loan transactions for the past 12 months.
9. A detailed list of any special or extraordinary expenses claimed (where child support is an issue) as well as copies of receipts or other documentation providing the amount of those expenses, namely:
 - a. child care costs;
 - b. health care and extended medical and dental insurance premiums attributable to the child;
 - c. uninsured health care and dental expenses;
 - d. extraordinary educational expenses;
 - e. post-secondary educational expenses; and
 - f. extraordinary expenses for extracurricular activities.
 10. If you are a beneficiary under a trust, a copy of the trust settlement agreement and copies of the trust's 3 most recent financial statements.
 11. Copies of all statements and cancelled cheques for all bank accounts held solely or jointly in your name for the most recent 6 months.
 12. Copies of credit card statements for all credit cards solely or jointly in your name for the most recent 6 months.
 13. Your monthly budget of expenses (where spousal or adult interdependent partner support is an issue). (See next page)
 14. A sworn itemized list of your income, assets and liabilities (in the form attached as Schedule A). (see following pages)
 15. Copies of the most recent statement for all RRSPs, pensions, term deposit certificates, guaranteed investment certificates, stock accounts and other investments in your name or in which you have an interest.
 16. A list of any exemptions claimed (where the action involves the division of matrimonial property).

Budget

MONTHLY EXPENSES

Child Support for children from a previous relationship: \$ _____

Mortgage/Rent: \$ _____

Property Taxes: \$ _____

Home Insurance: \$ _____

Home Repairs/Maintenance: \$ _____

Groceries/Toiletries/Cleaning Supplies: \$ _____

Phone (landline): \$ _____

Phone (cell): \$ _____

Internet: \$ _____

Cable/Satellite: \$ _____

Electricity: \$ _____

Heat: \$ _____

Prescriptions for Adult: \$ _____

Health Care Insurance for Adult: \$ _____

Dental for Adult: \$ _____

Eye Care for Adult: \$ _____

Meals Outside Home: \$ _____

Entertainment/Recreation: \$ _____

Fuel (personal use): \$ _____

Vehicle Repairs/Maintenance: \$ _____

Vehicle Insurance: \$ _____

Vehicle Loan:
(specify bank & vehicle) \$ _____

Vehicle Loan:
(specify bank & vehicle) \$ _____

Line of Credit:
(specify bank) \$ _____

Life Insurance: \$ _____

Credit Card Payments:
(specify card) \$ _____

Credit Card Payments:
(specify card) \$ _____

Other (specify): \$ _____

TOTAL MONTHLY EXPENSES: \$ _____

MONTHLY SECTION 7 EXPENSES

(expenses directly relating to children)

Childcare: \$ _____

Prescriptions for Children: \$ _____

Health Care Insurance for Children: \$ _____

Dental for Children (not insured): \$ _____

Eye Care for Children (not insured): \$ _____

Elementary School Functions/Supplies/Fees: (specify) \$ _____

Junior High School Functions/Supplies/Fees: (specify) \$ _____

High School Functions/Supplies/Fees: (specify) \$ _____

University/College (specify) \$ _____

Sports/Music/Recreation/Camps/Tutoring, etc. (specify) \$ _____

School Bus Fees: \$ _____

TOTAL SECTION 7 EXPENSES: \$ _____

SCHEDULE A to Form FL-17

STATEMENT OF INCOME, ASSETS AND LIABILITIES

This is the statement of income, assets and liabilities of _____ the _____ in this action.

A. INCOME

All of my sources of income and amounts of income per month are as follows:

- (a) Employment income of \$_____ from _____;
- (b) Employment insurance benefits of \$_____;
- (c) Worker’s Compensation Benefits of \$_____;
- (d) Interest and investment income of \$_____;
- (e) Pension income of \$_____;
- (f) Government assistance income of \$_____ from _____;
- (g) Self-employment income of \$_____;
- (h) Other income of \$_____ from _____.

My total income last year as indicated at line 150 of my _____ tax return was \$_____.

I expect my income at line 150 of my tax return this year to be \$_____.

B. ASSETS

Asset	Particulars	Date Acquired	Value (Estimated)
1. Real Estate (List any interest in land, including leasehold interests and mortgages, whether or not you are registered as owner. Provide legal descriptions and indicate estimated market value of your interest without deducting encumbrances or costs of disposition.)(Record encumbrances under debts.)			
2. Vehicles (List cars, trucks, motorcycles, trailers, motor homes, boats, etc.)			

<p>3. Financial Assets</p> <p>(List savings and chequing accounts, cash, term deposits, GICs, stocks, bonds, Canada Savings Bonds, mutual funds, insurance policies (indicate beneficiaries), accounts receivable, etc.)</p>			
<p>4. Pensions and RRSPs</p> <p>(Indicate name of institution where accounts are held, name and address of pension plan and pension details.)</p>			
<p>5. Corporate/Business Interests</p> <p>(List any interest you hold, directly or indirectly, in any corporation, unincorporated business, partnership, trust, joint venture, etc.)</p>			
<p>6. Other</p> <p>(List anything else of value that you own, including precious metals, collections, works of art, jewellery or household items of high value.</p> <p>Include location of any safety deposit boxes.)</p>			

C. DEBTS

Debt	Particulars	Date Incurred	Balance Owing	Monthly Payment
<p>1. Secured Debts</p> <p>(List all mortgages, lines of credit, car loans, and any other debt secured against an asset that you own.)</p>				

<p>2. Unsecured Debts</p> <p>(List all bank loans, personal loans, lines of credit, overdrafts, credit cards and any other debts that you have.)</p>				
<p>3. Other</p> <p>(List any other debts, including obligations that are relevant to a claim for undue hardship – e.g. car lease payment)</p>				

I, _____ solemnly declare that the facts set out in this document are true. I make this solemn declaration conscientiously believing it to be true and knowing that it is of the same force and effect as if made under oath.

Declared before me to be true on
 _____, _____,
 at _____, Alberta.

 Signature of person completing document

 Commissioner for Oaths in and for Alberta

 Print name and expiry/Lawyer/Student-at-Law

NOTE: It is an offence to make a false declaration.

FAMILY QUESTIONNAIRE

Ridley Law
Suite #4, 8 Columbia Avenue West
Devon, Alberta T9G 1Y6

PLAINTIFF _____
(print full legal name)

DEFENDANT _____
(print full legal name)

The date of the marriage was: _____
(month) (day) (year)

The place of the marriage was: _____
(city/town) (province)

The parties started to cohabit on: _____
(month) (day) (year)

The parties ceased cohabiting on: _____
(month) (day) (year)

The parties ceased cohabiting at: _____
(city/town) (province)

Particulars respecting the Plaintiff:

Address: _____
(complete mailing address)

Date of birth: _____ Place of birth: _____
(month) (day) (year) (city/town) (province)

Surname at birth: _____ Surname at the time of marriage: _____

Marital status at the time of marriage: Single Divorced

Res. Ph: _____ Cell: _____ Wrk: _____

Email: _____ Fax: _____

Employed by: _____ Annual Income: _____

Particulars respecting the Defendant:

Address: _____
(complete mailing address)

Date of birth: _____ Place of birth: _____
(month) (day) (year) (city/town) (province)

Surname at birth: _____ Surname at the time of marriage: _____

Marital status at the time of marriage: Single Divorced

Res. Ph: _____ Cell: _____ Wrk: _____

Email: _____ Fax: _____

Employed by: _____ Annual Income: _____

RESIDENCE

Has the **Plaintiff** has been ordinarily resident in the Province of Alberta for at least one year immediately preceding the date of this Statement of Claim? YES NO

Has the **Defendant** has been ordinarily resident in the Province of Alberta for at least one year immediately preceding the date of this Statement of Claim? YES NO

GROUND

The Plaintiff is seeking a divorce on the grounds of the breakdown of the marriage by reason of:
(choose those which apply)

- The parties are now separated and will have been separated for at least one (1) year at the determination of the divorce proceeding;
- The Defendant has, since the celebration of the marriage, committed adultery;
- The Defendant has, since the celebration of the marriage, treated the Plaintiff with physical or mental cruelty of such a kind as to render intolerable the continued cohabitation of the spouses.

CHILDREN

The particulars of each child of the marriage (which includes a child of one spouse to whom the other spouse stands in the place of a parent) are as follows: *(List all dependent children involved in this proceeding, even if no claims are being made in relation to those children.)*

_____, born _____
(full legal name of child) (month) (day) (year)

_____, born _____
(full legal name of child) (month) (day) (year)

_____, born _____
(full legal name of child) (month) (day) (year)

_____, born _____
(full legal name of child) (month) (day) (year)

The Plaintiff proposes custody for each child as follows:

The Plaintiff proposes access or parenting arrangements for each child as follows:

The Plaintiff proposes financial arrangements for each child as follows:

Child Support _____

Section 7's _____

Health/Dental Insurance _____ Other special needs? _____

AGREEMENTS

Have the parties have made an agreement regarding the custody, access, parenting arrangements or support of the children or support of each other?

NO YES *(provide date and summarize details of agreement and provide copy, if any)*

COURT PROCEEDINGS

Were there any other court proceedings in regard to the marriage, custody, access, parenting arrangements and support of the children or support of the parties?

NO YES *[provide date(s), summarize details, provide copies of Order(s)]*

SPOUSAL SUPPORT (choose one and give reasons where requested)

- The Plaintiff is claiming spousal support from the Defendant for the following reasons:
- The Plaintiff is not claiming spousal support from the Defendant.
- The Plaintiff proposes spousal support for the Defendant as follows, for the following reasons:

MATRIMONIAL PROPERTY CLAIM (choose that which applies)

- The parties are habitually resident in Alberta.
- The last joint habitual residence of the parties was in Alberta.
- The habitual residence of the parties as at the date of marriage was Alberta, and the parties have not since the marriage established a joint habitual residence.
- One spouse resides in Alberta and the other spouse is deceased.

AGREEMENTS

- Have the parties made an agreement regarding matrimonial property?
 - NO
 - YES (*provide date and summarize details of agreement and provide copy, if any*)

EXEMPTIONS

Is the Plaintiff claiming exemptions? NO YES (*provide details and reasons*)

DIVISION OF PROPERTY (choose one)

- The Plaintiff claims an equal division of the matrimonial property.

OR

- The Plaintiff claims an unequal division of the matrimonial property in favour of the Plaintiff for the following reasons: (*in case where the Plaintiff wishes to combine a claim for division of matrimonial property with a claim for unjust enrichment, add the following clause*)

UNJUST ENRICHMENT CLAIM

Is the Plaintiff making a claim of unjust enrichment? NO YES (*provide details and reasons*)

REMEDY SOUGHT IN THE ACTION FOR UNJUST ENRICHMENT (*if applicable*)

The Plaintiff makes the following claims in the action for unjust enrichment: (*list all remedies being sought*)\
