**Family Law Arbitration and Mediation Proceedings**

Between:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

And:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Financial Summary**

This is the financial statement of me, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

The legal issues in my case are:

□ the payment of child support, and I have completed **Part I** of this form;

□ the payment of child support and a claim has been made for an exception to the table amounts under section 10(1) of the Child Support Guidelines, and I have also completed **Part II** of this form;

□ the payment of child support and a claim has been made for an exception to the table amounts under sections 3(2)(b), 4(b), 5, 9 or 10(1) of the Child Support Guidelines, and I have also completed **Part III** of this form;

□ paying for children’s special expenses or extraordinary expenses, and I have also completed **Part IV** of this form;

□ the payment of spousal support, and I have completed **Part I**, **Part II** and **Part III** of this form;

□ dividing property, including real property and personal property, and I have completed **Part V** and **Part VI** of this form; and,

□ allocating responsibility for debt, and I have completed **Part VI** of this form.

I promise that the information provided in this statement is current, accurate and true, to the best of my knowledge and belief.

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature

**PART I: MY INCOME**

**Employment information**

□ I am employed by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

□ I am self-employed as \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

□ I operate an unincorporated business, the name and address of which is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

□ I am unemployed, and have been unemployed since \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

**Total income and sources of income**

|  |  |  |
| --- | --- | --- |
| Income from all sources |  | Total annual amount |
| Employment income, total received before deductions: | **+** |  |
| Self-employment income (gross income: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ), net received: | **+** |  |
| Other employment income, total received: | **+** |  |
| Rental income (gross amount: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ), net received: | **+** |  |
| Pension income, including CPP and OAS income, total received: | **+** |  |
| RRSP income, total received: | **+** |  |
| Interest and investment income, total received: | **+** |  |
| Dividends, total received: | **+** |  |
| Capital gains, (total capital gains: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ), net of capital losses: | **+** |  |
| Employment Insurance benefits, total received: | **+** |  |
| Worker’s Compensation benefits, total received: | **+** |  |
| Income Assistance or Income Support income, total received: | **+** |  |
| Spousal support received from someone other than other party, total received: | **+** |  |
| Other income, total received: | **+** |  |
| **A. TOTAL INCOME FROM ALL SOURCES** | **=** |  |

**Income for child support**

|  |  |  |
| --- | --- | --- |
| Adjustments to be added |  | Total annual amount |
| Capital cost allowance for real property, total amount: | **+** |  |
| Exercise of stock options (gross value when exercised: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ), net of cost to purchase shares and amount paid to acquire options: | **+** |  |
| **B. TOTAL ADJUSTMENTS TO BE ADDED TO INCOME** | **=** |  |
| Adjustments to be deducted |  | Total annual amount |
| Union dues and professional dues, total paid: | **+** |  |
| Business investment losses, total losses: | **+** |  |
| Carrying charges and interest expenses, total paid: | **+** |  |
| Partnership or sole proprietorship earnings that must be reinvested, total: | **+** |  |
| Prior period earnings (gross amount: $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ), net of reserves: | **+** |  |
| Employment expenses deducted under Schedule III of the Child Support Guidelines, total paid: | **+** |  |
| **C. TOTAL ADJUSTMENTS TO BE DEDUCTED FROM INCOME** | **=** |  |

**D.** My income for child support is **A** + **B** – **C** = $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

**Income for children’s special and extraordinary expenses**

|  |  |  |
| --- | --- | --- |
| Adjustments to be added |  | Total annual amount |
| Spousal support received from someone other than other party, total received: | **+** |  |
| Spousal support received from someone other than other party, total received: | **+** |  |
| **E. TOTAL ADJUSTMENTS TO BE ADDED TO INCOME FOR CHILD SUPPORT** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Adjustments to be deducted |  | Total annual amount |
| Spousal support paid to someone other than other party, total paid: | **+** |  |
| Spousal support paid to someone other than other party, total paid: | **+** |  |
| **F. TOTAL ADJUSTMENTS TO BE DEDUCTED FROM INCOME FOR CHILD SUPPORT** | **=** |  |

**G.** My income for children’s special and extraordinary expenses is **D** + **E** – **F** = $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

**Income for spousal support**

|  |  |  |
| --- | --- | --- |
| Adjustments to be added |  | Total annual amount |
| Child support received from other party, total received: | **+** |  |
| Canada Child Benefit income, total received: | **+** |  |
| BC Child Opportunity Benefit income, total received: | **+** |  |
| Alberta Child and Family Benefit income, total received: | **+** |  |
| Other child tax benefits and tax rebates, including GST rebates, total received: | **+** |  |
| **H. TOTAL ADJUSTMENTS TO BE ADDED TO INCOME FOR CHILD SUPPORT** | **=** |  |

**I.** My income for spousal support is **D** + **H** = $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

**PART II: INCOME AND CONTRIBUTIONS OF OTHER ADULTS IN THE HOME**

**Living arrangements**

□ I live alone.

□ I live with my spouse or partner, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

□ I live with these other adults: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

□ There are \_\_\_\_\_\_\_\_\_\_\_ other children, who are not my children with the other party, who live with me in the home.

**Income of spouse or partner**

□ My spouse or partner

□ works at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

□ is unemployed.

□ My spouse or partner

□ has total annual employment income of $\_\_\_\_\_\_\_\_\_\_\_ .

□ has total additional annual income from sources other than employment of $\_\_\_\_\_\_\_\_\_\_\_ .

□ does not earn income.

**Contributions of other adults toward expenses**

□ My spouse or partner contributes about $\_\_\_\_\_\_\_\_\_\_\_ per year toward housing expenses, utilities and services, household expenses and transportation expenses.

□ The other adults living in the home contribute about $\_\_\_\_\_\_\_\_\_\_\_ per year toward housing expenses, utilities and services, household expenses and transportation expenses.

**PART III: MY EXPENSES**

|  |  |  |
| --- | --- | --- |
| Compulsory deductions from income |  | Total annual amount |
| Canada Pension Plan contributions | **+** |  |
| Employment Insurance premiums | **+** |  |
| Income taxes | **+** |  |
| Employee pension contributions | **+** |  |
| Other deductions, including union dues (describe): | **+** |  |
| **A. TOTAL DEDUCTIONS** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Housing expenses |  | Total annual amount |
| Rent or mortgage | **+** |  |
| Property taxes | **+** |  |
| Renters’ insurance or property insurance | **+** |  |
| Water, sewer, garbage, recycling and composting fees | **+** |  |
| Strata or condominium fees | **+** |  |
| Repairs and maintenance | **+** |  |
| Other housing expenses (describe): | **+** |  |
| **B. TOTAL HOUSING EXPENSES** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Utilities and services |  | Total annual amount |
| Natural gas | **+** |  |
| Electricity | **+** |  |
| Landline telephone | **+** |  |
| Cellphone(s) used by me | **+** |  |
| Cable television and streaming services | **+** |  |
| Internet | **+** |  |
| Other expenses for utilities and services (describe): | **+** |  |
| **C. TOTAL UTILITIES AND SERVICES EXPENSES** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Household expenses |  | Total annual amount |
| Groceries | **+** |  |
| Household supplies | **+** |  |
| Meals outside the home | **+** |  |
| Furnishings and equipment | **+** |  |
| Other household expenses (describe): | **+** |  |
| **D. TOTAL HOUSEHOLD EXPENSES** | **=** |  |
| Personal expenses |  | Total annual amount |
| Clothing | **+** |  |
| Hair care | **+** |  |
| Toiletries and cosmetics | **+** |  |
| Education and training | **+** |  |
| Life insurance | **+** |  |
| Dry cleaning and laundry | **+** |  |
| Entertainment and recreation |  |  |
| Other personal expenses (describe): | **+** |  |
| **E. TOTAL PERSONAL EXPENSES** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Children’s expenses |  | Total annual amount |
| Clothing | **+** |  |
| Hair care | **+** |  |
| Child care, including daycare and baby sitting | **+** |  |
| School tuition, fees and supplies | **+** |  |
| Activities, teams and lessons | **+** |  |
| Summer camps | **+** |  |
| Entertainment and recreation | **+** |  |
| Gifts to children | **+** |  |
| Life insurance | **+** |  |
| Cellphone(s) used by children | **+** |  |
| Other expenses for children (describe): | **+** |  |
| **F. TOTAL CHILDREN’S EXPENSES** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Health care expenses |  | Total annual amount |
| Extended health insurance premiums | **+** |  |
| Dental and orthodontic insurance premiums | **+** |  |
| Health care costs, net of coverage | **+** |  |
| Prescription drug costs, net of coverage | **+** |  |
| Dental care and orthodontic costs, net of coverage | **+** |  |
| Other health care expenses (describe): | **+** |  |
| **G. TOTAL HEALTH CARE EXPENSES** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Savings |  | Total annual amount |
| RRSP and TFSA contributions | **+** |  |
| RESP contributions | **+** |  |
| RDSP contributions | **+** |  |
| Other savings (describe): | **+** |  |
| **H. TOTAL SAVINGS CONTRIBUTIONS** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Transportation expenses |  | Total annual amount |
| Public transit | **+** |  |
| Taxis and ridesharing services | **+** |  |
| Gas and oil | **+** |  |
| Car insurance and driver’s licence | **+** |  |
| Parking | **+** |  |
| Lease or car loan payments | **+** |  |
| Repairs and maintenance | **+** |  |
| Other transportation expenses (describe): | **+** |  |
| **I. TOTAL TRANSPORTATION EXPENSES** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Other expenses |  | Total annual amount |
| Newspapers, magazines, and news subscription services |  |  |
| Charitable donations | **+** |  |
| Vacations | **+** |  |
| Pet care and veterinary insurance premiums | **+** |  |
| Child support paid to someone other than other party | **+** |  |
| Spousal support paid to someone other than other party | **+** |  |
| Other expenses not shown in this form (describe): | **+** |  |
| **J. TOTAL OTHER EXPENSES** | **=** |  |

|  |  |  |
| --- | --- | --- |
| Debt payments |  | Total annual amount |
| Describe: | **+** |  |
| Describe: | **+** |  |
| Describe: | **+** |  |
| Describe: | **+** |  |
| Describe: | **+** |  |
| **K. TOTAL DEBT PAYMENTS** | **=** |  |

**L.** My total annual expenses are **A** + **B** + **C** + **D** + **E** + **F** + **G** + **H** + **I** + **J** + **K** = $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ .

**PART IV: CHILDREN’S SPECIAL EXPENSES AND EXTRAORDINARY EXPENSES**

The amounts of the children’s expenses for childcare, medical and dental premiums, health-related expenses, extraordinary expenses for primary or secondary school, post-secondary education expenses, and extraordinary extracurricular activities are:

|  |  |  |  |
| --- | --- | --- | --- |
| Name of child | Type of expense | Total annual cost  of expense | Total available  deductions, credits,  subsidies and other  contributions to cost |
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| **TOTAL ANNUAL COST AND CONTRIBUTIONS TO COST** | |  |  |

**PART V: PROPERTY**

The real property I own, including bare land, leasehold and mortgage interests, is:

|  |  |  |  |
| --- | --- | --- | --- |
| Address of property,  and nature and type of ownership  of property | Date acquired | Estimated fair market value of  my interest: | |
| on the earlier of  the date we began  to live together  or married | today |
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| **TOTAL FAIR MARKET VALUE OF REAL PROPERTY** | |  |  |

The vehicles I own, including cars, trucks, motorcycles, trailers, motor homes, boats, and other recreational vehicles and watercraft are:

|  |  |  |  |
| --- | --- | --- | --- |
| Make, model and year of  vehicle or watercraft | Date acquired | Estimated fair market value: | |
| on the earlier of  the date we began  to live together  or married | today |
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| **TOTAL FAIR MARKET VALUE OF VEHICLES** | |  |  |

The financial assets I own, including bank accounts, term deposits, stocks, bonds, warrants, options, mutual funds, insurance policies and accounts receivable, are:

|  |  |  |  |
| --- | --- | --- | --- |
| Type of asset, name of  financial institution and account number | Date acquired | Balance, cash surrender value, or  estimated fair market value: | |
| on the earlier of  the date we began  to live together  or married | today |
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| **TOTAL FAIR MARKET VALUE OF FINANCIAL ASSETS** | |  |  |

The pensionable savings I own, including private pensions, RRSPs, RRIFs and LIRAs and other assets, are:

|  |  |  |  |
| --- | --- | --- | --- |
| Type of asset, name of  financial institution and account number | Date acquired | Balance or estimated  fair market value: | |
| on the earlier of  the date we began  to live together  or married | today |
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| **TOTAL FAIR MARKET VALUE OF PENSIONS** | |  |  |

The business interests I own, directly or indirectly, and including incorporated and unincorporated businesses, partnerships, trusts and joint ventures, are:

|  |  |  |  |
| --- | --- | --- | --- |
| Name and address of business,  and nature and type of interest in business | Date acquired | Estimated fair market value of  my interest: | |
| on the earlier of  the date we began  to live together  or married | today |
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| **TOTAL FAIR MARKET VALUE OF BUSINESS INTERESTS** | |  |  |

The other property I own, including tools, sports and hobby equipment, collections, precious metals, works of art, jewelry, safety deposit boxes and household items of high value, are:

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Date acquired | Estimated fair market value: | |
| on the earlier of  the date we began  to live together  or married | today |
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| **TOTAL FAIR MARKET VALUE OF OTHER PROPERTY** | |  |  |

The property I have disposed of in the last two year, including real property and other property, is:

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Date disposed | Estimated fair  market value  of property  when disposed | Amount received  for property  when disposed |
|  |  |  |  |
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| **TOTAL FAIR MARKET VALUE AND AMOUNT RECEIVED** | |  |  |

**PART VI: DEBT**

The secured debts I owe, including mortgages, lines of credit and car loans, are:

|  |  |  |  |
| --- | --- | --- | --- |
| Type of debt, name  of financial institution and  account number | Estimated amount owed: | | |
| on the earlier of  the date we began  to live together  or married | on the date  we separated | today |
|  |  |  |  |
|  |  |  |  |
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| **TOTAL SECURED DEBTS OWED** |  |  |  |

The unsecured debts I owe, including unsecured lines of credit, credit card accounts, bank loans, accounts payable, tax arrears and personal loans, are:

|  |  |  |  |
| --- | --- | --- | --- |
| Type of debt, name  of financial institution and  account number | Estimated amount owed: | | |
| on the earlier of  the date we began  to live together  or married | on the date  we separated | today |
|  |  |  |  |
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| **TOTAL UNSECURED DEBTS OWED** |  |  |  |