

## Family Law Arbitration and Mediation Proceedings

Between:

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And:

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### 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:	+	
<b>A. TOTAL INCOME FROM ALL SOURCES</b>	=	

### 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>B. TOTAL ADJUSTMENTS TO BE ADDED TO INCOME</b>	=	

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:	+
<b>C. TOTAL ADJUSTMENTS TO BE DEDUCTED FROM INCOME</b>	=

**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:	+
<b>E. TOTAL ADJUSTMENTS TO BE ADDED TO INCOME FOR CHILD SUPPORT</b>	=

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:	+
<b>F. TOTAL ADJUSTMENTS TO BE DEDUCTED FROM INCOME FOR CHILD SUPPORT</b>	=

**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:	+
<b>H. TOTAL ADJUSTMENTS TO BE ADDED TO INCOME FOR CHILD SUPPORT</b>	=

**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):	+	
<b>A. TOTAL DEDUCTIONS</b>	=	

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>B. TOTAL HOUSING EXPENSES</b>	=	

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):	+	
<b>C. TOTAL UTILITIES AND SERVICES EXPENSES</b>	=	

Household expenses		Total annual amount
Groceries	+	
Household supplies	+	
Meals outside the home	+	
Furnishings and equipment	+	
Other household expenses (describe):	+	
<b>D. TOTAL HOUSEHOLD EXPENSES</b>	=	

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):	+
<b>E. TOTAL PERSONAL EXPENSES</b>	<b>=</b>

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):	+
<b>F. TOTAL CHILDREN'S EXPENSES</b>	<b>=</b>

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):	+
<b>G. TOTAL HEALTH CARE EXPENSES</b>	<b>=</b>

Savings	Total annual amount
RRSP and TFSA contributions	+
RESP contributions	+
RDSP contributions	+
Other savings (describe):	+
<b>H. TOTAL SAVINGS CONTRIBUTIONS</b>	=

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):	+
<b>I. TOTAL TRANSPORTATION EXPENSES</b>	=

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):	+
<b>J. TOTAL OTHER EXPENSES</b>	=

Debt payments	Total annual amount
Describe:	+
Describe:	+
Describe:	+
Describe:	+
Describe:	+
<b>K. TOTAL DEBT PAYMENTS</b>	=

**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
<b>TOTAL ANNUAL COST AND CONTRIBUTIONS TO COST</b>			



**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
<b>TOTAL FAIR MARKET VALUE OF REAL PROPERTY</b>			

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
<b>TOTAL FAIR MARKET VALUE OF VEHICLES</b>			

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
<b>TOTAL FAIR MARKET VALUE OF FINANCIAL ASSETS</b>			

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
<b>TOTAL FAIR MARKET VALUE OF PENSIONS</b>			

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
<b>TOTAL FAIR MARKET VALUE OF BUSINESS INTERESTS</b>			

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
<b>TOTAL FAIR MARKET VALUE OF OTHER PROPERTY</b>			

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
<b>TOTAL FAIR MARKET VALUE AND AMOUNT RECEIVED</b>			

**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
<b>TOTAL SECURED DEBTS OWED</b>			

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
<b>TOTAL UNSECURED DEBTS OWED</b>			