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## Separation Agreement Intake Worksheet

### **General Information**

#### **Person 1**

Full Legal Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Occupation: \_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

Email: \_\_\_\_\_

#### **Person 2**

Full Legal Name: \_\_\_\_\_

SIN: \_\_\_\_\_

Occupation: \_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

Email: \_\_\_\_\_

### **Relationship History**

Date Married: _____
Location of Marriage: _____
Date Began Cohabiting: _____
Address Where First Lived Together: _____ _____
Was This First Home Rented, Owned Jointly, or Owned Solely (if solely, by whom): _____
Date of Separation: _____

### **Matrimonial Home**

<b>Address</b>
<i>(For Urban Properties)</i>
Street Name: _____ Number: _____
City: _____ Province: _____
<i>(For Rural Properties)</i>
Town [ ] Village [ ] Township [ ] or County [ ]
Of: _____
Lot and Concession: _____ Province: _____

**Matrimonial Home Continued**

**If Owned**

Who is On Title? \_\_\_\_\_

Fair Market Value: \_\_\_\_\_

Mortgage Balance (if any): \_\_\_\_\_

Line of Credit Balance (if any): \_\_\_\_\_

**Will the matrimonial home be sold on the market?**    Yes [  ]    No [  ]

OR

**Does one spouse intend on purchasing the home from the other?**    Yes [  ]    No [  ]

Describe the arrangement (*price, date of closing, etc.*): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**If Rented**

Describe Arrangement (*is one person moving out, what date, arrangements regarding lease, etc.*): \_\_\_\_\_

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**Matrimonial Home Continued**

**Rented OR Owned:** Who will pay the occupancy costs and utilities? Until when?

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**General Household Items**

Have all other property and household furnishings been divided? Yes [ ] No [ ]

**If no,** explain how property will be divided: \_\_\_\_\_

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Describe any special arrangements regarding vehicles or other assets not addressed above: \_\_\_\_\_

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### **Spousal Support**

Describe Any Spousal Support Arrangement: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### **Lump Sum Payment**

Is there to be a lump sum cash payment of any kind? Yes [ ] No [ ]

Amount: \_\_\_\_\_ Payor: \_\_\_\_\_

Date of Payment: \_\_\_\_\_

Method of Payment: Cash [ ] Personal Cheque [ ] Certified Cheque / Bank Draft [ ]

Reason for Payment: \_\_\_\_\_

### **Release of a Division of Canada Pension Plan Pension Credits**

Do you agree that neither of you will apply for a division of Canada Pension Plan Credits? Yes [ ] No [ ]

**If no**, explain the pension credit arrangements: \_\_\_\_\_

\_\_\_\_\_

### **Medical and Dental Benefits**

Will you each be responsible for your own medical, extended health and dental expenses?  
Yes [ ] No [ ]

**If no**, explain the arrangement: \_\_\_\_\_

\_\_\_\_\_

**Children**

Full Legal Name:	Date of Birth:

**Describe the Parenting Arrangements for the Children** (*Which days of the week with each parent, when and where pick-up and drop-off will take place and by whom, any changes between school and summer months, etc.*)

*Note: arrangement may be altered upon consent of both parents*

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**Children Continued**

**Special Parenting Times:** *Describe frequency and duration of special parenting time, summer vacation, holidays, birthdays, telephone contact, etc.*

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**Child Support:** *If require Table calculation, supply annual income for payor*

Payor: \_\_\_\_\_ Amount: \_\_\_\_\_

If require Table calculation, supply **annual income for payor:** \_\_\_\_\_

The amount of child support is subject to the court's approval even if you and your spouse agree on an amount.

If the child support you have agreed on differs from the Table amount, explain the reason for the difference: \_\_\_\_\_

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**Children Continued****Special and Extraordinary Expenses:**

Describe any arrangements regarding costs of extracurricular activities, daycare, tuition, or other special and extraordinary expenses:

*Note: Usually each parent would pay a pro-rated share of these expenses based on their comparative incomes. For example, if parent A's income is \$60,000 and parent B's is \$40,000, then parent A would pay 60% and Parent B 40%.*

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Do you agree that if one parent dies, sole custody of the child(ren) would revert to the surviving parent? Yes [ ] No [ ]

**If no**, describe arrangement: \_\_\_\_\_

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Who will be the guardian for the children if both parents die? \_\_\_\_\_

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Do you agree that if one parent dies, the surviving parent will ensure the child(ren) continue to have contact with the family of the deceased parent? Yes [ ] No [ ]



**Assets and Liabilities**

Description of Asset	Value	% Person 1	% Person 2

Description of Debt	Value	% Person 1	% Person 2

33 FRONT STREET NORTH, ORILLIA, ON L3V 4R6

(P) 705-326-2221 (F) 705-326-0795 [advice@thedivorcecentre.ca](mailto:advice@thedivorcecentre.ca)

**Assets & Liabilities Continued****Asset Division and Debt Payment**

Describe any arrangements regarding division of specific assets or responsibilities over specific debts which you want included in your separation agreement:

*Include relevant dates (ex. date by which a debt must be paid or asset transferred/sold)*

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**Pension**

Do either of you have a pension?

Describe: \_\_\_\_\_

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Will the pensions be divided? Yes [ ] No [ ]

If yes, describe how: \_\_\_\_\_

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**Dispute Resolution**

If there is a future dispute, would you want to mediate?

Yes [ ] No [ ]

If mediation is not successful, do you want to pursue binding arbitration through The Divorce Centre or have the Family Court resolve the issues?

TDC Arbitration [ ] Family Court [ ]

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**Independent Legal Advice**

Do either party intend on seeking independent legal advice?

Yes [ ] No [ ]

**If yes, provide details:** \_\_\_\_\_

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

**Please provide any other information that you wish to have included in your agreement.**

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

The undersigned requests The Divorce Centre to prepare a Separation Agreement in accordance with the above information.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature