

DOMESTIC AGREEMENTS | WORKSHEET 2 OF 3

Financial Disclosure Schedule Builder

Creates the asset, debt and income schedule that supports informed agreement negotiations.

BEST USED
WHEN

Use this before terms are finalized and attach source documents rather than estimates where possible.

ALBERTA LEGAL CHECKPOINT

An Alberta domestic agreement works best when the decisions, disclosure and legal formalities all support the same bargain. For an agreement that changes Family Property Act rights, each person's separate written acknowledgement before a different lawyer is part of the statutory process. Starting early leaves room to exchange records, understand the trade-offs and negotiate without last-minute pressure.

Primary source: [Alberta Family Property Act, sections 37-38](#)

PREPARED FOR _____

DATE _____

1 Complete what you know

2 Mark gaps and assumptions

3 Attach supporting records

THE PRACTICE LENS

A net-worth number is not meaningful unless the other person can understand what sits behind it. We pair every material value with ownership, debt, tax characteristics, valuation date and a source record so consent to the agreement is informed rather than assumed.

A CONCRETE EXAMPLE

Listing "company shares - value TBD" beside a personal tax return does not explain the asset being protected. Corporate financial statements, shareholder records, compensation history and an agreed valuation approach may be needed before the schedule supports a durable bargain.

Asset schedule

Use one row per issue and identify the source for every important number or date.

Asset	Owner	Value/date	Supporting record
Real estate			
Bank and investments			
Pension and retirement			
Business or partnership			
Trust, inheritance or gift			
Other significant property			

Debt and obligation schedule

Use one row per issue and identify the source for every important number or date.

Debt/obligation	Debtor	Balance	Supporting record
Mortgage or secured debt			
Credit and personal loans			
Tax debt			
Guarantee or contingent liability			
Support or family obligation			

Disclosure quality check

Tick completed items. Circle anything that needs a document, follow-up or legal advice.

- ☐ Values have a stated date and source.
- ☐ Material income and benefits are disclosed.
- ☐ Corporate and trust interests are described, not merely named.
- ☐ Potential tax and contingent liabilities are identified.
- ☐ Each person has had an opportunity to ask follow-up questions.
- ☐ The signed agreement records or attaches the disclosure relied upon.

BRING THIS TO YOUR CONSULTATION

You do not need every blank filled. Mark the three items that matter most, attach the records you relied on and use this handoff to identify the next decision.

STATUS	☐ Ready to discuss ☐ Missing records ☐ Deadline or urgent issue
NEXT REAL DEADLINE	
RECORD OR ANSWER STILL NEEDED	
DECISION I NEED HELP WITH	

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