

DOMESTIC AGREEMENTS | WORKSHEET 3 OF 3

Agreement Life-Change Review Checklist

Flags events that may make an older domestic agreement incomplete, impractical or inconsistent with current plans.

BEST USED
WHEN

Use this after marriage, children, relocation, illness, inheritance or a major business change.

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

An agreement does not automatically update itself when the family changes. We compare its assumptions with present life, identify clauses that no longer fit and decide whether the right response is an amendment, a new agreement or simply better implementation records.

A CONCRETE EXAMPLE

An agreement signed before children assumes both partners will remain fully employed and keep separate homes. Years later, one has taken parental leave and the family has moved into a home funded partly by an inheritance. The old words need to be tested against the new facts before a crisis.

Review triggers

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

- ☐ Marriage after signing a cohabitation agreement.
- ☐ Birth, adoption or a material change in parenting roles.
- ☐ Purchase, sale or refinance of a family home.
- ☐ Inheritance, family gift or major business transaction.
- ☐ Disability, illness, career interruption or retirement.
- ☐ Relocation to another province or country.
- ☐ A significant change in income, debt or financial dependence.

Does the agreement still work?

Use short factual notes. If an answer is uncertain, write what would confirm it.

1. Do the defined terms match the property and relationships that now exist?

2. Can the payment or transfer obligations still be performed?

3. Does the agreement coordinate with wills, trusts, insurance and beneficiary designations?

4. Have the reasons for a support waiver or property term materially changed?

5. Would both people understand the practical result if separation occurred today?

Plan the update

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

Clause/topic	Current problem	Proposed update	Adviser needed

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	