FAMILY PROPERTY | WORKSHEET 1 OF 3

Family Property Inventory and Evidence Map

Tracks ownership, value, debt, key dates and the record supporting each property claim.

BEST USED WHEN	Use this at the start of disclosure or before comparing settlement proposals.

ALBERTA LEGAL CHECKPOINT

A useful Alberta property analysis begins before anyone divides a total. You need to know what exists, who owns it, what it was worth at key dates, the debt attached to it and whether an exemption or agreement may change the result. Financial disclosure is mandatory when a family-property application is filed in court.

Primary source: Alberta Family Justice Strategy: mandatory requirements

PREPARED FOR ______________________ DATE ______________________

1 Complete what you know	2 Mark gaps and assumptions	3 Attach supporting records

THE PRACTICE LENS

Property work is not a single net-worth subtraction. We connect each asset to ownership, debt, key dates, source documents and any claimed exemption, then identify where the paper trail stops. That makes the real disagreement visible before money is spent arguing about totals.

A CONCRETE EXAMPLE

A home is worth $750,000 with a $310,000 mortgage, but one spouse says an $80,000 parental gift funded the down payment. The purchase statement, transfer record, gift evidence and later refinancing history may be as important as today's appraisal.

Property inventory

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

Asset or debt	Owner	Estimated value	Document source
Home or other real estate			
Bank and investments			
Pensions and retirement			
Business interests			
Vehicles and valuable items			
Credit, loans and tax debt			
Trusts, options or contingent interests			

Key-date evidence

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

[ ] Record values near cohabitation, marriage, separation and today where relevant.

[ ] Identify purchase price, source of funds and later contributions.

[ ] Locate statements closest to each important date rather than relying on memory.

[ ] Record transfers, withdrawals, refinancing or unusual debt around separation.

[ ] Identify property held by a corporation, trust, nominee or related person.

Claim map

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

1. Which value is agreed and which requires an appraisal or expert?
2. Is an exemption or unequal division claimed, and what traces the original property?
3. What tax, selling or financing cost affects the usable value?
4. What record is controlled by the other person or a third party?
5. Which item must be preserved before settlement discussions continue?

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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