DIVORCE AND SEPARATION | WORKSHEET 3 OF 3

Separation Disclosure Starter Pack

A document inventory for income, property, debt, business interests and family expenses.

BEST USED WHEN	Use this before requesting disclosure or preparing for negotiation, mediation or court.

ALBERTA LEGAL CHECKPOINT

You do not need a court order to separate. If you rely on one year of separation as the ground for divorce, you may start the case before the year is complete, but the divorce cannot be granted until you have lived separate and apart for at least one year. Parenting, support, property, safety and deadline issues may need attention much sooner.

Primary source: [Justice Canada: How to apply for a divorce]

PREPARED FOR ____________________ DATE ____________________

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

THE PRACTICE LENS

A large stack of documents can still leave the decisive fact unanswered. We look for continuity across key dates, the source of funds and records that explain unusual transactions-not simply the latest statement for each account.

A CONCRETE EXAMPLE

A current investment statement shows $240,000, but not whether $75,000 came from an inheritance or what happened to those funds after deposit. The gift letter, deposit record and transaction history may matter more than another current balance printout.

Income and benefits

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

[ ] Three most recent personal tax returns and notices of assessment or reassessment.

[ ] Current pay statements and year-to-date earnings.

[ ] Employment contract, bonus plan, benefit statement and stock or option records.

[ ] Self-employment, partnership, trust or corporate financial records.

[ ] Evidence of recurring non-taxable benefits, allowances or personal expenses paid by a business.

Property and debt

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

- [ ] Bank and investment statements near cohabitation, marriage, separation and today.
- [ ] Real-estate purchase, mortgage, line-of-credit and current-value information.
- [ ] Pension, RRSP, TFSA, RESP, stock, cryptocurrency and insurance cash-value records.
- [ ] Credit cards, tax debt, personal loans, guarantees and contingent liabilities.
- [ ] Documents supporting an inheritance, gift, pre-relationship asset or other exemption claim.

Build the missing-document list

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

Missing record	Who has it	Why it matters	Requested on

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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