

# Request for Financial Information

Court File Number

**BETWEEN**

Name(s)

[Empty box for Applicant Name(s)]

**Applicant(s)**

**and**

Name(s)

[Empty box for Respondent Name(s)]

**Respondent(s)**

Court Stamp

**Notice to party requesting disclosure: Carefully review the list of items that may be requested, and only check those items that are relevant to the particular proceedings.**

You are hereby required to provide the documents checked below

to \_\_\_\_\_  
Name and address for service of party requesting documents

**within 30 days of receiving this Request for Financial Information. If you do not, the Court may make an order against you, which may include an order for the payment of support in an amount the Court considers appropriate, order you to provide the information, or order someone else (for example your employer) to provide the information. You may also be ordered to pay costs.**

- 1. A copy of every personal income tax return you have filed for each of the 3 most recent taxation years.
- 2. A copy of every Notice of Assessment and Re-Assessment issued by the Canada Revenue Agency for each of the 3 most recent taxation years, or a copy of the Canada Revenue Agency printout of your last 3 years' income tax returns.
- 3. If you are an employee, a copy of your 3 most recent statement of earnings indicating your total earnings paid year to date including overtime, or where such a statement is not provided by your employer, a letter from your employer setting out that information, including your rate of annual salary or remuneration.
- 4. If you receive income from employment insurance, income assistance, a pension, workers compensation, disability payments, or any other source, the most recent statement of income showing the total income from the source during the current year, or a letter from the appropriate authority giving the required information.
- 5. If you are a student, a statement indicating the total amount of student funding you have received during the current academic year, including loans, grants, bursaries, scholarships and living allowances.
- 6. If you are self-employed:
  - (a) the financial statements of your business or professional practice for the 3 most recent taxation years;
  - (b) a statement showing a breakdown of all salaries, wages, management fees, other payments or benefits paid to you or to persons or corporations with whom you do not deal at arm's length for the 3 most recent taxation years; and
  - (c) particulars or copies of every cheque issued to you during the last 6 weeks from any business in which you have an interest or to which you have provided a service.
- 7. If you are a partner in a partnership, confirmation of your income and draws from the partnership and confirmation of the capital in the partnership for its 3 most recent taxation years.

Applicant's Name

Court File Number

- 8. If you have a 1% or more interest in a privately held corporation:
  - (a) the financial statements of the corporation and its subsidiaries for its 3 most recent taxation years; and
  - (b) a statement showing a breakdown of all salaries, wages, management fees or other payments or benefits paid to you or to persons or corporations with whom the corporation, and every related corporation, does not deal at arm's length for the corporation's 3 most recent taxation years.
- 9. If you are a beneficiary under a trust, a copy of the trust settlement agreement and copies of the trust's 3 most recent financial statements.
- 10. Copies of all bank account statements and cancelled cheques solely or jointly in your name for the last 6 months.
- 11. Copies of credit card statements for all credit cards solely or jointly in your name for the last 3 months.
- 12. Where child support is an issue, a detailed list of any special or extraordinary expenses claimed as well as copies of receipts or other documentation providing the amount of those expenses, namely:
  - (a) child care costs
  - (b) health care costs and extended medical and dental insurance premiums attributable to the child
  - (c) uninsured health care and dental expenses
  - (d) extraordinary educational expenses
  - (e) post secondary educational expenses
  - (f) extraordinary extracurricular expenses
- 13. If this is a Claim for spousal or adult interdependent partner support, your monthly budget of expenses. (form available)
- 14. A sworn list of all of your sources of income as well as your assets and liabilities.
- 15. Copies of your most recent statement for all R.R.S.P.'s, pensions, term deposit certificates, guaranteed investment certificates and other investments in your name or in which you have an interest.

Dated \_\_\_\_\_,  
 at \_\_\_\_\_, Alberta.

\_\_\_\_\_  
 Signature

Specify person signing request \_\_\_\_\_  
 Applicant/Applicant's Lawyer/Respondent/Respondent's Lawyer