

PL Law – Disclosure Homework		File Naming Examples	
<input type="checkbox"/>	<b>Marriage Certificate</b> (can be obtained from any Motor Vehicle Registry).	<i>Marriage Certificate John Smith &amp; Jane Doe Jan 1, 2010.pdf</i>	
<input type="checkbox"/>	<b>Photograph</b> of your Spouse (if filing for divorce).	<i>Photo – Jamie Smith.pdf</i>	
<input type="checkbox"/>	<b>Tax Returns</b> for last 3 years (or, if not filed, copies of T4, T4A and all other relevant tax slips and statements disclosing any and all sources of income for the year).	<i>T1A 2024 Jamie Smith.pdf</i>	
<input type="checkbox"/>	<b>Notices of Assessment</b> from CRA for last 3 years.	<i>NOA 2024 Jamie Smith.pdf</i>	
<input type="checkbox"/>	<b>Pay stubs</b> from employer for last 3 pay periods, including year-to-date earnings (if not possible, then a letter from employer setting out that information including annual salary/remuneration).	<i>Pay Stub – ABC Company Jan 1-15, 2024.pdf</i>	
<input type="checkbox"/>	<b>Bank Account</b> Statements and cancelled checks for last 6 months (held solely or jointly with another person).	<i>RBC John and Jane Smith Chequing - 6789 Jan 28 – Feb 26, 2024.pdf</i>	
<input type="checkbox"/>	<b>Credit Card/LOC</b> Statements for last 6 months (held solely and jointly with another person).	<i>RBC John and Jane Smith Visa -6789 Jan 28 – Feb 26, 2024.pdf</i>	
<input type="checkbox"/>	List and receipts for <b>child expenses</b> you are claiming against the other parent (childcare, medical and dental insurance, health-related, educational, post-secondary educational, extra-curricular).	<i>Childcare – ABC Daycare Jan 2024.pdf</i>	
<input type="checkbox"/>	<b>Parenting After Separation</b> Seminar Certificate (required if children under 16 years of age and seeking divorce or applying in Court of Queen’s Bench).	<i>PASS Jamie Smith Jan 20, 2024.pdf</i>	
<input type="checkbox"/>	<b>Monthly Budget of Expenses</b> (required if spousal support is an issue).	<i>Monthly Budget John Doe Date Submitted.pdf</i>	
If you have...		then we require:	File Naming Examples
RRSP/RESP	<input type="checkbox"/>	Most recent statement.	<i>RBC RRSP Jamie Smith –6789 Jan 20, 2024.pdf</i>
Pension	<input type="checkbox"/>	Most recent statement and pension division statement, if available.	<i>LAPP Jamie Smith Jan 20, 2024.pdf</i>
Term Deposit Certificates	<input type="checkbox"/>	Most recent statement.	<i>RBC Term Deposit Jamie Smith–6789 Jan 20, 2024.pdf</i>
GICs	<input type="checkbox"/>	Most recent statement.	<i>RBC GIC Jamie Smith –6789 Jan 20, 2024.pdf</i>
Stocks/Shares	<input type="checkbox"/>	Most recent statement.	<i>AST Trust Company Dividend or Certificate January 20, 2024.pdf</i>
Any other investment	<input type="checkbox"/>	Most recent statement.	<i>Investment Name Jamie Smith January 20, 2024.pdf</i>
EI	<input type="checkbox"/>	3 most recent statements and total received year-to-date.	<i>EI Jamie Smith Jan 20, 2024.pdf</i>
Social Assistance	<input type="checkbox"/>	Most recent statement.	<i>Social Assist Jamie Smith Jan 20, 2024.pdf</i>
Worker’s Comp.	<input type="checkbox"/>	Most recent statement.	<i>WBC Jamie Smith Jan 20, 2024.pdf</i>
Disability payments	<input type="checkbox"/>	Most recent statement.	<i>Disability Jamie Smith Jan 20, 2024.pdf</i>

If you have...		then we require:	File Naming Examples
Student finance	<input type="checkbox"/>	Most recent statements for loans, grants, bursaries, scholarships, and educational living allowances.	<i>Student Finance Jamie Smith Jan 20, 2024.pdf</i>
Business: Self-employed, corporation, partnership	<input type="checkbox"/>	Financial statements for last 3 taxation years, year of marriage, year prior, and cohabitation year	<i>ABC Company 2024 Financial Statements.pdf</i>
	<input type="checkbox"/>	General Ledger statements for last 3 and current taxation years.	<i>ABC Company 2024 GL Statement.pdf</i>
	<input type="checkbox"/>	Statement showing all your salaries, wages, management fees or other payments or benefits for last 3 years.	<i>ABC Company 2024 Salary Wage Fee Info.pdf</i>
	<input type="checkbox"/>	Any forms you provided your accountant setting out personal expenses for the last 3 taxation years (e.g. cell phone, vehicle, home office).	<i>Jamie Smith 2024 Personal Expenses.pdf</i>
	<input type="checkbox"/>	If corporation: record of last 12 months of your shareholder's loan transactions.	<i>ABC Company Shareholder Transactions Feb 2023 – Feb 2024.pdf</i>
	<input type="checkbox"/>	If unincorporated: copies of each cheque issued to you during last 6 weeks from your business or corporation, or from any person or business to which you have rendered a service.	<i>ABC Company Cheques Received Jan 15 – Feb 28, 2024.pdf.</i>
	<input type="checkbox"/>	If partnership: confirmation of your income and draws from, and capital in, the partnership for the partnership's last 3 taxation years.	<i>ABC Company Partnership Income Draws 2022 - 2024.pdf</i>
Trust/beneficiary	<input type="checkbox"/>	Copy of Trust Settlement Agreement.	<i>Trust Settlement Jamie Smith August 15, 2005.pdf</i>
	<input type="checkbox"/>	Copies of trust's last 3 financial statements.	<i>Trust Settlement Jamie Smith 2024 Financial Statement.pdf</i>
Any other income source	<input type="checkbox"/>	Most recent statement.	<i>Other Income Jamie Smith description January 20, 2024.pdf</i>

Instruction Notes:

- Please submit all files as PDF files, except the photo of the spouse which can be picture format.
- If you are taking pictures of documents, there are ways to convert a picture to a pdf including Notes on an iPhone or any scanner app on your cellphone, i.e. CamScanner. Time spent converting non-pdf files to pdf will be billed to your file.
- Please follow the naming conventions listed above. If the files are not named appropriately, you will be billed for any necessary time spent by support staff reviewing and identifying files.
- Financial statement file for joint accounts should include both names in the file name.
- Use only the last 4 digits of any account number in the file name.
- If an expense submitted is for specific child and not all children, include the child's name.
- If you are submitting information not listed above, file names must be descriptive and dated.