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| COURT FILE NUMBER | Clerk’s Stamp |
| COURT | COURT OF KING’S BENCH OF ALBERTA |
| JUDICIAL CENTRE | Click to Select Judicial Centre. |
| APPLICANT |  |
| RESPONDENT |  |
| DOCUMENT | **DISCLOSURE ORDER** |
| ORDER PREPARED BY |  |

|  |  |
| --- | --- |
| ADDRESS FOR SERVICE AND CONTACT INFORMATION OF PARTY FILING THIS DOCUMENT |  |

DATE ON WHICH ORDER WAS PRONOUNCED:

LOCATION WHERE ORDER GRANTED: Click to Select Judicial Centre**, Alberta**

NAME OF JUSTICE WHO GRANTED THIS ORDER:

THE COURT HAS REVIEWED THE REQUEST FOR A DISCLOSURE ORDER, SUPPORTING MATERIALS FILED BY THE APPLICANT, AND ANY RESPONSE TO REQUEST FOR DISCLOSURE PROVIDED BY THE RESPONDENT:

**IT IS ORDERED THAT:**

**The Respondent shall provide to the Applicant by** Click to Select Date **, the following disclosure** *(select those that apply)*:

|  |  |
| --- | --- |
|  | 1. A copy of every personal income tax return the Respondent has filed for each of the 3 most recent taxation years. If the Respondent has not filed a tax return for the previous year, the Respondent must provide copies of all T4, T4A, and all other relevant tax slips and statements disclosing any and all sources of income for the previous year |
|  | 1. A copy of every notice of assessment and reassessment to the Respondent for each of the 3 most recent taxation years, or a copy of the Canada Revenue Agency printout of the Respondent’s last 3 years’ income tax returns. |
|  | 1. If the Respondent is an employee, a copy of each of their 3 most recent statements of earnings indicating the Respondent’s total earnings paid in the year to date, including overtime, or where such a statement is not provided by their employer, a letter from the employer setting out that information, including the Respondent’s rate of annual salary or remuneration. |
|  | 1. If the Respondent receives income from employment insurance, social assistance, a pension, workers’ compensation, disability payments, dividends or any other source, the most recent statement of income indicating the total amount of income from the applicable source during the current year or, if such a statement is not provided, a letter from the appropriate authority stating the required information. |
|  | 1. If the Respondent is a student, a statement indicating the total amount of student funding the Respondent has received during the current academic year, including loans, grant, bursaries, scholarships and living allowances |
|  | 1. If the Respondent is self-employed in an unincorporated business:    * + - 1. particulars or copies of every cheque issued to the Respondent during the last 6 weeks from any business or corporation in which the Respondent has an interest, or to which the Respondent has rendered a service;          2. the financial statements of the Respondent’s business or professional practice for the 3 most recent taxation years; and          3. a statement showing a breakdown of all salaries, wages, management fees or other payments or benefits paid to the Respondent, or to persons or corporations with whom the Respondent does not deal at arm’s length, for the 3 most recent taxation years. |
|  | 1. If the Respondent is a partner in a partnership, confirmation of their income and draws from, and capital in, the partnership for its 3 most recent taxation years. |
|  | 1. If the Respondent has a 1% or more interest in a privately held corporation:    * + - 1. the financial statements of the corporation and its subsidiaries for its 3 most recent taxation years;          2. a statement showing a breakdown of all salaries, wages, management fees or other payments or benefits paid to the Respondent, 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; and          3. a record showing the Respondent shareholder’s loan transactions for the past 12 months. |
|  | 1. A detailed list of any special or extraordinary expenses claimed by the Respondent (where child support is an issue) as well as copies of receipts or other documentation providing the amount of those expenses, namely:    * + - 1. child care costs;          2. health care and extended medical and dental insurance premiums attributable to the child;          3. uninsured health care and dental expenses;          4. extraordinary educational expenses          5. post-secondary educational expenses; and          6. extraordinary expenses for extracurricular activities. |
|  | 1. If the Respondent is a beneficiary under a trust, a copy of the trust settlement agreement and copies of the trust’s 3 most recent financial statements. |
|  | 1. Copies of all statements and cancelled cheques for all bank accounts held solely or jointly in the name of the Respondent for the most recent 6 months. |
|  | 1. Copies of credit card statements for all credit cards solely or jointly in the name of the Respondent for the most recent 6 months. |
|  | 1. The Respondent’s monthly budget of expenses (where spousal or adult interdependent partner support is an issue). |
|  | 1. A sworn itemized list of the Respondent’s income, assets and liabilities (in the form attached as Schedule A to this Order). |
|  | 1. Copies of the most recent statement for all RRSPs, pensions, term deposit certificates, guaranteed investment certificates, stock accounts and other investments in the name of the Respondent or in which the Respondent has an interest. |
|  | 1. A list of any exemptions claimed by the Respondent (where the action involves the division of family property or, in a case to which rule 12.121 applies, matrimonial property). |

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Justice of the Court of King’s Bench of Alberta

**SCHEDULE A**

**STATEMENT OF INCOME, ASSETS AND LIABILITIES**

This is the statement of income, assets and liabilities of       the *Select Plaintiff or Defendant* in this action.

1. **INCOME**

All of my sources of income and amounts of income per month are as follows:

(a) Employment income of $       from *Click to type employer name*;

(b) Employment insurance benefits of $      ;

(c) Worker’s Compensation Benefits of $      ;

(d) Interest and investment income of $      ;

(e) Pension income of $      ;

(f) Government assistance income of $       from *Click to type source* ;

(g) Self-employment income of $      ;

(h) Other income of $       from *Click to type source* .

My total income last year as indicated at line 150 of my [year] tax return was $      .

I expect my income at line 150 of my tax return this year to be $       .

**B. ASSETS**

|  |  |  |  |
| --- | --- | --- | --- |
| Asset | Particulars | Date Acquired | Value (Estimated) |
| 1. Real Estate  (List any interest in land, including leasehold interests and mortgages, whether or not you are registered as owner. Provide legal descriptions and indicate estimated market value of your interest without deducting encumbrances or costs of disposition.)(Record encumbrances under debts.) |  |  |  |
| 2. Vehicles  (List cars, trucks, motorcycles, trailers, motor homes, boats, etc.) |  |  |  |
| 3. Financial Assets  (List savings and chequing accounts, cash, term deposits, GICs, stocks, bonds, Canada Savings Bonds, mutual funds, insurance policies (indicate beneficiaries), accounts receivable, etc.) |  |  |  |
| 4. Pensions and RRSPs  (Indicate name of institution where accounts are held, name and address of pension plan and pension details.) |  |  |  |
| 5. Corporate/Business  Interests  (List any interest you hold, directly or indirectly, in any corporation, unincorporated business, partnership, trust, joint venture, etc.) |  |  |  |
| 6. Other  (List anything else of value that you own, including precious metals, collections, works of art, jewellery or household items of high value.  Include location of any safety deposit boxes.) |  |  |  |

**C. DEBTS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Debt | Particulars | Date Incurred | Balance Owing | Monthly Payment |
| 1. Secured Debts  (List all mortgages, lines of credit, car loans, and any other debt secured against an asset that you own.) |  |  |  |  |
| 2. Unsecured Debts  (List all bank loans, personal loans, lines of credit, overdrafts, credit cards and any other debts that you have.) |  |  |  |  |
| 3. Other  (List any other debts, including obligations that are relevant to a claim for undue hardship – e.g. car lease payment) |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

I, *Click here to type name of person making declaration* , solemnly declare that the facts set out in this document are true. I make this solemn declaration conscientiously believing it to be true and knowing that it is of the same force and effect as if made under oath.

Declared before me to be true on

this       day of Select Month, 20  ,

at the City of       in the Province of Alberta. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of person completing document

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Commissioner for Oaths in and for Alberta

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Print name and expiry/Lawyer/Student-at-Law

NOTE: It is an offence to make a false declaration.