



Next Step Divorce Coaching™
Powered by VPro Financial Services
Clarity • Confidence • Compassion

CLIENT INTAKE FORM

Thank you for choosing **Next Step Divorce Coaching™** — *Powered by VPro Financial Services.*

Based on your answers, we'll help you build a tactical roadmap — one that protects your finances, supports your emotional wellbeing, and prepares you for what's ahead.

You don't have to do this alone. Let's take the next step together.

Please complete this form before your first session. All information is confidential.

SECTION 1 — GENERAL INFORMATION

Date: _____

Client Name: _____

Address: _____

City: _____ Province: _____

Postal Code: _____

Phone: _____

Email: _____

Date of Birth (MM/DD/YYYY): _____

Ex/Spouse/Partner's Name: _____

Preferred Session Day/Time/Frequency: _____



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SECTION 2 — FEES & PAYMENT

Coaching Fee Structure:

- The Clarity & Vetting Jumpstart (3 Sessions) \$400-\$450
- The Negotiation Readiness Retainer (3 hours) \$400-\$450
- Strategic Case Preparation Package (5 hours) \$650-\$750
- OnDemand-Client Lead Coaching Session (1 Hour) \$150

Preferred Payment Method:

- E-Transfer: ktm.vpro@gmail.com

SECTION 3 — FINANCIAL & DISCLOSURE INFORMATION

This section helps us organize financial disclosure preparation and identify important documentation early in the process.

Please check any items you currently have access to and/or can obtain.

Income & Tax Documentation

- Last 3 years of Income Tax Returns and Notices of Assessment (NOAs)
- Most recent 3 pay stubs (proof of YTD income)
- Pension Valuation / Statement of Family Law Value
- Business income documentation
- Commission or bonus income documentation



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Banking & Investments

- Personal bank accounts
- Joint bank accounts
- Business bank accounts
- RRSPs
- TFSAs
- Stocks / Bonds / Investment accounts
- Trust interests or stock option documentation

Real Estate & Property

- Matrimonial home information
- Cottage / vacation property
- Rental properties
- Mortgage statements
- Lines of credit (as of separation)
- Personal property valuations (jewelry, art, electronics, collectibles)
- Safety deposit box contents and valuations

Vehicles & Business Interests

- Vehicles (cars, boats, ATVs, recreational vehicles)
- Business ownership interests/shares
- Corporate financial documents



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Debts & Liabilities

- Credit card balances (as of separation)
- Personal loans
- Taxes owed to CRA
- Other debts/liabilities

Marriage & Separation Documentation

- Marriage certificate
- Marriage contract / Prenuptial agreement
- Separation agreement
- Existing court orders or endorsements

Excluded Property & Special Claims

- Assets owned on date of marriage
- Debts owed on date of marriage
- Inheritances or gifts received
- Personal injury settlements or awards



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SECTION 4 – IMPORTANT ISSUES

Please outline the key issues you want to address in coaching and what you hope to achieve.

• Issue #1:

• Issue #2:

• Issue #3:



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SECTION 5 – PRIORITIES & NEXT STEPS

Please identify the areas where you feel you need the most clarity, organization, or support right now.

Current Priorities

(Check all that apply)

- Financial organization
- Understanding disclosure requirements
- Preparing for mediation or negotiation
- Communication boundaries with spouse/ex
- Parenting and scheduling concerns
- Understanding support obligations
- Asset and debt organization
- Preparing documents for legal counsel
- Budgeting and financial planning
- Emotional overwhelm / decision fatigue
- Court process confusion
- Separation timeline planning
- Rebuilding financial independence



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SECTION 6 – CONFIDENTIALITY & DISCLAIMER

Next Step Divorce Coaching™ – Powered by VPro Financial Services provides educational and organizational divorce support designed to help clients prepare for conversations, financial disclosure, documentation, and strategic decision-making during separation and divorce.

Coaching services are not legal advice, financial advice, psychotherapy, or mental health treatment.

All information shared is kept confidential within the limits of applicable law.

Clients are encouraged to consult qualified legal, financial, and mental health professionals where appropriate.



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SECTION 7 – CLIENT ACKNOWLEDGMENT & SIGNATURE

I acknowledge that the information provided in this intake form is accurate to the best of my knowledge.

I understand that Next Step Divorce Coaching™ – Powered by VPro Financial provides educational and organizational coaching support only and does not provide legal representation, legal advice, financial advice, or mental health treatment.

I understand that I remain responsible for all legal, financial, and personal decisions made throughout my separation or divorce process.

I agree to participate in coaching services with honesty, openness, and a commitment to organized preparation and informed decision-making.

Client Name (Printed): _____

Signature: _____

Date: _____