



**MARRIAGE  
CONTRACT/COHABITATION  
CONSULTATION**

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# Identification



1. Explain need and requirement for identification
2. Obtain copy of Driver's License or other photo identification.

# Purpose of Consultation

- Advise Client with respect to the purpose of contract/agreement and when needed.
- Explain basic Family Law principles
- Explain Law with respect to contracts/agreements
- Explain necessity of coordinating contract/agreement with Will and financial management
- Obtain information
- Obtain Client's instructions to draft contract/agreement
- Answer Client's questions
- Confirm LSP process to finalize
- Confirm fees and sign retainer
- Provide Client and Lawyer "To Do" list
- Provide and explain LSP Client Manual
- Obtain information to open file

# Purpose of the Contract/Agreement

1. Contract out of the Law when appropriate to do so
2. Provide more certainty as to what happens on separation, death, incapacity
3. Provide proof of what the assets were and their value when married as it may be relevant later

# Basic Family Law Principles



1. Support

2. Equalization of Assets

3. Matrimonial Home

# Law of Marriage Contracts/Cohabitation Agreements

1. What is not allowed to be covered – children, home, welfare
2. Formalities – disclosure, legal representation
3. Also set aside if duress, fraud, undue influence
4. Also possibly set aside if unconscionable – really long marriage
5. LSP cannot represent both sides – for Client's protection
6. What if other side refuses to get a Lawyer

# Coordinating



One of three parts –

- Others being
- Wills & Powers of Attorney
- How to govern financial affairs



**Obtain Information**

Complete Client Information Forms

# Obtain Instructions



Complete Lawyer instructions form

# LSP Process to Finalize



- Explain process to execute and complete the file

# Fees and Retainer



- Explain fees and have client sign retainer

# Followup Checklists



- Provide client with possible “To Do” List

# Manual and New Client Memorandum

The background of the slide features a stylized, 3D perspective illustration of several stacks of papers or documents. The papers are light gray with white outlines, creating a sense of depth and layering. The stacks are arranged in a way that suggests a large volume of documents, with some papers overlapping others.

- Give Client manual
- Explain what is in the manual
- Give and review LSP 'New Client Memorandum'

# Requisition Form to Open File

The background of the slide features a stylized, 3D perspective illustration of a stack of papers or forms. The papers are arranged in two main sections, one above and one below the central text, with multiple layers creating a sense of depth and volume. The papers are light gray with white outlines, and the overall effect is clean and professional.

1. Complete Requisition to Open File Form
2. Provide LSP magnet