

ONTARIO COURT (GENERAL DIVISION)

Between:

CATHERINE ROSS

and

WILLIAM ROSS

FINANCIAL STATEMENT

I, CATHERINE ROSS, OF THE TOWNSHIP OF WEST CARLETON, MAKE OATH AND SAY:

1. Particulars of my financial situation and of all my property are accurately set out below, to the best of my knowledge, information and belief.

ALL INCOME & MONEY RECEIVED

(Include all income & other money received from all sources, whether taxable or not. Show gross amount here and show deductions on pages 3, 4, 5, & 6. Give current actual amount where known or ascertainable. Where amount cannot be ascertained, give your best estimate. Use weekly, monthly, & yearly column as appropriate.)

CATEGORY	WEEKLY	MONTHLY	YEARLY
1. Salary or Wages			\$26,040.00
2. Bonuses			
3. Fees			
4. Commissions			
5. Child Tax Benefit			
6. Unemployment Insurance			
7. Workers' Compensation			
8. Public Assistance			
9. Pension			
10. Dividends			
11. Interest			
12. Rental Income*			
13. Allowances & Support from others			
14. Other (Specify)			
* NOTE: the rental payments presently go toward payment of the mortgage, which the Respondent is currently paying. Current rental payments on the jointly owned property are \$671.36			
TOTALS			\$26,040.00

(Weekly Total) x (4.33) = _____ monthly
 (Monthly Total) x (1.00) = _____ monthly
 (Yearly Total) / (12.00) = \$2,170.00 monthly

GROSS MONTHLY INCOME = \$2,170.00

OTHER BENEFITS

(Show all non-monetary benefits from all sources, such as use of a vehicle or room and board, and include such items as insurance or dental plans or other expenses paid on your behalf. Give your best estimate where you cannot ascertain the actual value.)

ITEM	PARTICULARS	MONTHLY MARKET VALUE
	TOTAL	
	GROSS MONTHLY INCOME & BENEFITS	<u><u>\$2,170.00</u></u>

ACTUAL & PROPOSED BUDGETS

CATEGORY	ACTUAL BUDGET			PROPOSED BUDGET		
	WEEKLY	MONTHLY	YEARLY	WEEKLY	MONTHLY	YEARLY
	for twelve (12) month period From January, 1994 To December, 1994			Show your proposed budget, giving your best estimate where you cannot ascertain the actual amount.		
	** Marked items are items that the Respondent is currently paying			Note: Increase Factor 1.000		
HOUSING						
1. Rent						
2. Real property taxes**						\$2,011.48
3. Mortgage (1st & 2nd)**					\$865.00	
4. Common expenses						
5. Water						
6. Electricity (est.)**					\$210.00	
7. Propane (est.)**					\$200.00	
8. Fuel oil						
9. Telephone		\$30.00	22.70		\$30.00	
10. Cable T.V. <i>cable</i>		x \$50.00	<i>not paid</i>		\$50.00	
11. Home Insurance**						\$300.00
12. Repairs and maintenance**						\$1,000.00
13. Gardening and snow removal**						\$600.00
14. Other - specify						
FOOD, TOILETRIES & SUNDRIES						
15. Groceries	\$150.00			\$120.00		
16. Meals outside home						
17. Toiletries & sundries		\$35.00			\$35.00	
18. Grooming		\$35.00			\$35.00	
19. General household supplies		\$20.00			\$20.00	
20. Laundry, dry cleaning			\$200.00 100.00			\$200.00
21. Other - specify						

CATEGORY	ACTUAL			PROPOSED BUDGET		
	WEEKLY	MONTHLY	YEARLY	WEEKLY	MONTHLY	YEARLY
CLOTHING			(#84)1			
22. Children			× \$1,400.00			\$1,400.00
23. Self			× \$1,200.00			\$1,200.00
TRANSPORTATION			(9108)2			
24. Public transit						
25. Taxis, car pool						
26. Car insurance		\$64.00			\$64.00	
27. Licence			\$66.00			\$66.00
28. Car maintenance**						\$300.00
29. Gasoline, oil**		2.00		\$25.00		
30. Parking		× \$10.00			\$10.00	
31. Other - specify						
HEALTH & MEDICAL						
32. Doctors, chiropractors		29.60 × \$40.00			\$40.00	
33. Dentist (regular care)**						\$200.00
34. Orthodontist, or special dental care						\$500.00
35. Insurance premiums**						
36. Drugs (prescription)**		-25.00				
37. Vitamins		× \$30.00			\$30.00	
37a. Glasses			\$200.00 100.00			\$200.00
DEDUCTIONS FROM INCOME						
38. Income tax	\$111.53			\$111.50		
39. Canada Pension Plan	\$12.91			\$12.90		
40. Unemployment insurance	\$17.25			\$17.30		
41. Employer pension						
42. Social Club	\$0.50			\$0.50		
43. Group insurance						
44. Credit union loan						
45. Credit union savings						
46. Other - United Way	\$2.50			\$2.50		

CATEGORY	ACTUAL			PROPOSED BUDGET		
	WEEKLY	MONTHLY	YEARLY	WEEKLY	MONTHLY	YEARLY
MISCELLANEOUS						
47. Life insurance premiums		56.00 × \$57.00			\$57.00	
48. Tuition fees, books, etc.						
49. Entertainment			× \$300.00			\$300.00
50. Recreation						
51. Vacation						
52. Gifts			\$500.00			\$500.00
53. Babysitting, day care			\$5,000.00			\$5,000.00
54. Children's allowances**				\$4.00		
55. Children's activities						
56. Support payments						
57. Newspapers, periodicals						
58. Alcohol, tobacco	\$23.00		\$100.00	\$23.00		\$100.00
59. Charities						
60. Income tax (not deducted at source)						
61. Other - Pet Care			× \$1,650.00 1346.40			\$1,650.00
LOAN PAYMENTS						
62. Banks		× \$390.00			\$390.00	
63. Finance companies (VISA)		× \$170.00			\$170.00	
64. Credit unions		× \$60.00			\$60.00	
65. Department stores		× \$35.00			\$35.00	
66. Other - specify						

CATEGORY	ACTUAL			PROPOSED BUDGET		
	WEEKLY	MONTHLY	YEARLY	WEEKLY	MONTHLY	YEARLY
SAVINGS						
67. RRSP / RSP						\$2,000.00
68. Other - Specify						
TOTALS	\$317.69	\$1,026.00	\$10,616.00	\$316.70	\$2,301.00	\$17,527.48

✓ 303.60 8266.00
 28929 / YR

TOTALS OF ACTUAL BUDGET

Monthly Total = \$1,026.00
 Weekly Total x 4.33 = \$1,375.60
 Yearly Total / 12 = \$884.67

MONTHLY ACTUAL BUDGET

x \$3,286.27

2369.09

SUMMARY OF INCOME & EXPENSES ACTUAL

Gross monthly income \$2,170.00
 Subtract Actual monthly budget - x \$3,286.27
 2369.09

ACTUAL MONTHLY SURPLUS / (DEFICIT)

(\$1,116.27)

(917.18)

TOTALS OF PROPOSED BUDGET

Monthly Total = \$2,301.00
 Weekly Total x 4.33 = \$1,371.31
 Yearly Total / 12 = \$1,460.62

MONTHLY PROPOSED BUDGET

\$5,132.93

SUMMARY OF INCOME & EXPENSES PROPOSED

Gross monthly income \$2,170.00
 Subtract Proposed monthly budget - \$5,132.93

PROPOSED MONTHLY SURPLUS / (DEFICIT)

(\$2,962.93)

NOTE: The proposed deficit shown is misleading, in that the costs of operating the matrimonial home are included, but the rental income, which I do not presently receive is not. Once receipt of rental income were taken into account, the deficit would be \$2291.57.

LAND

(Include any interest in land owned on the valuation date, including leasehold interests and mortgages, whether or not you are registered as owner. Include claims to an interest in land, but do not include claims that you are making against your spouse in this or a related proceeding. Show estimated market value of your interest without deducting encumbrances or costs of disposition, and show encumbrances and costs of disposition under Debts and Other Liabilities on page 12.)

NATURE & TYPE OF OWNERSHIP (State percentage interest where relevant.)	NATURE & ADDRESS OF PROPERTY	ESTIMATED MARKET VALUE OF YOUR INTEREST AS OF: (See instructions above)		
		DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
		Date:		
Joint	Matrimonial Home 1077 Thomas A. Dolan Parkway, Dunrobin, Ontario (Part Lot 1, Conc. 4, Dunrobin) Property is a duplex, incorporating the matrimonial home and a rental unit		\$80,000.00 75,000.00 \$80,000.00	\$80,000.00
TOTALS			\$80,000.00	\$80,000.00

GENERAL HOUSEHOLD ITEMS & VEHICLES

(Show estimated market value, not cost of replacement for these items owned on the valuation date. Do not deduct encumbrances here but show encumbrances under Debts and Other Liabilities on page 12.)

ITEM	PARTICULARS	ESTIMATED MARKET VALUE OF YOUR INTEREST AS OF: (See instructions above)		
		DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
General household contents including special items			2,500	
a) matrimonial home(s)	To be divided		Unknown	Unknown
b) elsewhere				
Jewellery	appraisal's from Champion Auction to obtain		\$800.00	\$800.00
Works of art	S. Dali print <i>by</i>		\$700.00	\$700.00
Vehicles & boats	Honda Accord (1988) Blue book 5200-		\$3,000.00	\$3,000.00
Other special items				
TOTALS			\$4,500.00	\$4,500.00

SAVINGS & SAVINGS PLANS

(Show items owned on the valuation date by category. Include cash, accounts in financial institutions, registered retirement or other savings plans, deposit receipts, pensions and any other savings.)

CATEGORY	INSTITUTION	ACCOUNT NUMBER	AMOUNT AS OF:		
			DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
Chequing	CIBC -- Bell's Corners Branch	586-00-66532		(\$477.33)	(\$800.00)
TOTALS				(\$477.33)	(\$800.00)

SECURITIES

(Show items owned on the valuation date by category. Include shares, bonds, warrants, options, debentures, notes and any other securities. Give your best estimate of market value if the items were to be sold on the open market.)

CATEGORY	DESCRIPTION	NUMBER	ESTIMATED MARKET VALUE AS OF:		
			DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
TOTALS					

LIFE & DISABILITY INSURANCE*(List all policies owned on the valuation date.)*

COMPANY & POLICY NO.	KIND OF POLICY	OWNER	BENEFICIARY	\$ FACE VALUE	CASH SURRENDER VALUE AS OF:		
					DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
Met. Life	Whole	Self	Children	100,000		\$1,225.00	\$1,225.00
Met. Life	Whole	Self	Mother	5,000		\$318.00	\$318.00
TOTALS						\$1,543.00	\$1,543.00

ACCOUNTS RECEIVABLE*(Give particulars of all debts owing to you on the valuation date, whether arising from business or from personal dealings.)*

PARTICULARS	AMOUNT AS OF:		
	DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
Revenue Canada re: 1993 income tax refund (est.)		\$1,500.00]	
TOTALS			
		\$1,500.00	

BUSINESS INTERESTS

(Show any interest in an unincorporated business owned on the valuation date. A controlling interest in an incorporated business may be shown here or under Securities on page 9. Give your best estimate of market value if the business were to be sold on an open market.)

NAME OF FIRM OR COMPANY	INTEREST	ESTIMATED MARKET VALUE AS OF:		
		DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
TOTALS				

OTHER PROPERTY

(Show other property owned on valuation date by categories. Include property of any kind not shown above. Give your best estimate of market value.)

CATEGORY	PARTICULARS	ESTIMATED MARKET VALUE AS OF:		
		DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
Animals	Golden Retriever, Siamese cats, Himilayan cat, and abyssinian cat ??? 8 puppies @ \$650 each		\$500.00	\$500.00
TOTALS			\$500.00	\$500.00

DEBTS & OTHER LIABILITIES

(Show your debts and liabilities on the valuation date, whether arising from personal or business dealings, by category such as mortgages, charges, liens, credit cards, notes and accounts payable. Include contingent liabilities such as guarantees and indicate that they are contingent.)

CATEGORY	PARTICULARS	VALUE AS OF:		
		DATE OF MARRIAGE	VALUATION DATE	DATE OF STATEMENT
Bank Loan	Personal Loan to CIBC re: debt consolidation (est.)		\$11,200.00	\$11,200.00
Credit Card	VISA		\$3,532.99	\$3,500.00
Line of Credit	CS Coop		\$1,982.24	\$2,000.00
Crompton	Ring payment		\$800.00	
TOTALS			\$17,515.23	\$16,700.00

PROPERTY, DEBTS & OTHER LIABILITIES ON DATE OF MARRIAGE

(Show by category the value of your property and your debts and other liabilities calculated as of the date of your marriage. Do not include the value of a matrimonial home that you owned at the date of marriage.)

CATEGORY	PARTICULARS	VALUE AS OF MARRIAGE DATE:	
		ASSETS	LIABILITIES
Land, excludes Matrimonial Home owned on Date of Marriage		TBA	
General Household Items and Vehicles			
Savings and Savings Plans			
Securities			
Life and Disability Insurance			
Accounts Receivable			
Business Interests			
Other Property			
Debts and Other Liabilities			
TOTALS			
NET VALUE OF PROPERTY OWNED ON DATE OF MARRIAGE =			

EXCLUDED PROPERTY

(Show the value by category of property owned on the valuation date that is excluded from the definition of "net family property".)

CATEGORY	PARTICULARS	VALUE ON VALUATION DATE
TOTAL		

DISPOSAL OF PROPERTY

(Show the value by category of all property that you disposed of during the two years immediately preceding the making of this statement, or during the marriage, whichever period is shorter.)

CATEGORY	PARTICULARS	VALUE
Jewelry	Ring -- sold to mother in payment of debt	\$1,950.00
Furniture	Antique rocker -- sold to mother in payment of debt ✓	\$8,000.00
Furniture	Nursing Chair -- sold to mother in payment of debt ✓	\$250.00
China	China -- sold to mother in payment of debt ✓	\$2,000.00
TOTAL		\$12,200.00

$$\begin{array}{r} 5125 \\ 2 \overline{) 10250} \end{array}$$

CALCULATION OF NET FAMILY PROPERTY

Value of all property owned on valuation date		\$87,565.67
Subtract value of all deductions	-	\$17,515.23
Subtract value of all excluded property	-	
NET FAMILY PROPERTY		<u><u>\$70,050.44</u></u>

2. The name(s) and address(es) of my employer(s) are: MITEL Corp.

350 Legget Drive
P.O. Box 13089
Kanata, Ontario
K2K 1X3

3. Attached to this affidavit are a copy of my income tax return filed with the Department of National Revenue for the last taxation year, together with all material filed with it, and a copy of any notice of assessment or reassessment that I have received from the Department for that year.


4. I do not anticipate any material changes in the information set out above.

Sworn before me at the

City of Ottawa in the

Regional Municipality of Ottawa-Carleton

on May 16, 1994


 Commissioner for Taking Affidavits etc.

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 Signature of deponent

CATEGORY FROM ACTUAL BUDGET <i>(NOTE: The following categories do NOT include "Other - specify" subheadings except as noted below.)</i>	BUDGETED MONTHLY	%AGE ALLOCATED TO CHILD(REN)	\$ TOTAL ALLOCATED TO CHILD(REN)
1. Housing (mortgage/rent, utilities, etc.)	\$929.60	67%	\$622.83
2. Groceries	\$519.60	67%	\$348.13
3. Meals outside home			
4. Toiletries & sundries	\$35.00	50%	\$17.50
5. Grooming	\$35.00	50%	\$17.50
6. General household supplies	\$20.00	67%	\$13.40
7. Laundry & dry cleaning	\$16.67	20%	\$3.33
8. Children's clothing	\$116.67	100%	\$116.67
9. Transportation, personal car expenses*	\$212.75		
10. Transportation (public,busing,taxi,etc.)			
11. Doctors, chiropractors	\$40.00	67%	\$26.80
12. Dentists (regular care)			
13. Orthodontist, special dental care			
14. Health & medical insurance premiums			
15. Prescription Drugs			
16. Life insurance premiums	\$57.00	90%	\$51.30
17. Tuition fees, books			
18. Entertainment	\$25.00	50%	\$12.50
19. Recreation			
20. Vacation			
21. Gifts	\$41.67	67%	\$27.92
22. Babysitting, day care	\$416.67	100%	\$416.67
23. Children's allowances		100%	
24. Children's activities		100%	
25. Newspapers, publications, magazines			
26. Other - Vitamins	\$30.00	67%	\$20.10
27. Other -- Pet Care expenses	\$137.50	50%	\$68.75
28.			
29.			
30.			
31.			
CHILDREN'S MONTHLY EXPENSES TOTAL			\$1,763.40

PARAS FORMULA GUIDELINE:

<i>(Enter appropriate spousal income)</i>	Spousal Income	%age of Total Income	Paras \$ Share
Husband	\$70,000.00	72.89%	\$1,285.28
Wife	\$26,040.00	27.11%	\$478.12

COMMENTS & NOTES:

- * This does not include any car loan payments
- ** Husband's income is estimated

CATHERINE L. E. ROSS
Petitioner

- and -

WILLIAM THOMAS ROSS
Respondent

ONTARIO COURT (GENERAL DIVISION)

Proceeding commenced at Ottawa

FINANCIAL STATEMENT

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Barrister and Solicitor
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120 Holland Avenue
Ottawa, Ontario
K1Y 0X6

BOX 333
(613) 729-4669

SOLICITOR FOR THE PETITIONER