

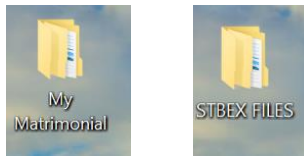








INTRODUCTION TO ORGANIZING YOUR FILES















How to set up and organize your files on your computer or on the cloud
















You can save your files to your desktop or laptop. You may also wish to consider using the cloud (i.e., Dropbox, Google Drive, OneDrive, etc.) as it can be safer if you are concerned about others accessing your computer. Whether on your computer or the cloud, we also suggest that you use a new password and change it every few months.



































In the chart below, we will provide you with our suggested file set up. We will take you through it step by step. On the **left side**, we detail the suggested step and explanation. On the **right side**, we provide you with a graphic visual which may be of assistance.













	EXPLANATION	SAMPLE FOLDERS AND DOCUMENTS
1	Main Folder Set-up It is a good idea first to create the main file folder . You can name the main folder whatever you like, but some people prefer to put a simple unrelated name if others (i.e., kids or spouse) may get access to your computer.	Main File Samples 
2	Inside the Main File  My Matrimonial As in the example on the right, set up these six (6) additional folders within that main file. You will likely need each of these folders for the initial steps in your case. This system will make finding a document you may need, be it a letter, a particular bank statement, a paystub for your spouse, etc. MUCH easier.	 My Matrimonial  1 - Correspondence and Notes  2 - Court Correspondence  3 - My Productions  4 - My Spouse's Productions  5 - Expert Reports  6 - Litigation
























































The next steps will focus on creating subfiles within EACH of these 6 main files


























3	<p>1 - Correspondence and Notes: further subfiles</p> <p> 1 - Correspondence and Notes</p> <p>This main Correspondence and Notes file should contain several subfiles. Why?</p> <p>Throughout your case, you will be emailing, etc., with what we call 'participants' in your court case. For example, if your spouse has a lawyer, you will need a subfolder for all letters sent to them and received from this lawyer. If you have kids and a Children's Lawyer was appointed, you will need another folder for all correspondence with this lawyer. You will also want to keep all communications (email or otherwise) you have sent to your spouse or received from your spouse.</p>	<p> 1 - Correspondence and Notes</p> <p> Children's Lawyer- Correspondence & Notes</p> <p> My Spouse - Correspondence & Notes</p> <p> My Spouses's Lawyer- Correspondence & Notes</p>
4	<p>1 - Correspondence and Notes: how to save letters within <u>any</u> correspondence subfile you have created</p> <p>In the right-hand column, we use the subfile called "My Spouse's Lawyer" as an example. BUT the same method of saving letters would apply to EACH of your correspondence subfiles.</p> <p>You should keep a copy of each letter that you send to your spouses' lawyer or that they send to you. That way, you have a complete record of all exchanges made during your court case.</p> <p>To quickly find any letter, whether it was sent to you by the lawyer or you sent it to the lawyer, it is suggested that you:</p> <ol style="list-style-type: none"> Save them in date order so that the <i>oldest to newest</i> will appear. You can see this is the example to your right; Use your initials and those of the lawyer AND the words "To" or "From." This way, you can quickly identify all letters you wrote and all letters received from the lawyer. 	<p> My Spouse's Lawyer</p> <p> 2020-10-25 From Spouse Lawyer re retained.pdf</p> <p> 2020-10-29 To Spouse Lawyer re consent to late service.pdf</p> <p> 2020-11-12 From SL re Keeping Extended Health Care.pdf</p> <p> 2020-11-28 To SL Responding to Extended Health.pdf</p> <p> 2020-12-08 From SL re Serving Answer.pdf</p> <p> 2020-12-29 To SL re Serving Reply.pdf</p>















	The example shown in the right-hand column should make this clear.	
5	<h2>2 - Court Correspondence</h2> <p> 2 - Court Correspondence</p> <p>For each court attendance, presently, you must fax to the court what is called a "Confirmation Form." This form tells the judge that you have confirmed with your spouse (if self-representing) or your spouses' lawyer that the court attendance will be proceeding and on what issues.</p> <p>It can be useful to have a separate subfile where you keep copies of these "Confirmation Forms." Sometimes the court may lose them, and you will need a copy of the document and fax confirmation to prove that you confirmed this step.</p>	<p> 2 - Court Correspondence</p> <p> 2020-01-26 Form 14C re Jan 20-2020 Motion.pdf</p> <p> 2020-12-11 Form 17F Dec 18-2020 CC Confirmation.pdf</p>
6	<h2>3 - My Productions:</h2> <p> 3- My Productions</p> <p>As we have told you, you will likely have to prepare several "Financial Statements" (FS) during your court case. To help keep yourself organized, it can be useful to have a separate main file for each financial statement you have completed. The title of the subfolder is identified by the date you swore or affirmed the FS. All documents used for each FS are kept in separate subfiles, as shown in this example.</p>	<p> 3- My Productions</p> <p> 1 - FS sworn September 20, 2020</p> <p> 2 - FS sworn December 3, 2020</p>
7	<h2>3 – My Productions: first subfolder "1 – FS sworn September 20, 2020</h2> <p> 1 - FS sworn September 20, 2020</p> <p>It may be useful to have 4 separate subfiles. The first 3 - Income, Expenses, and Property – mirror the 3 sections of the FS. You can keep all your documents related to the heading. (i.e., in the income folder, you may have pay stubs or social</p>	<p> 3- My Productions</p> <p> 1 - FS sworn September 20, 2020</p> <p> 1 - Income</p> <p> 2 - Expenses</p> <p> 3 - Property</p> <p> 4 - FS & Certificate of Financial Disclosure</p>

	assistance statements and income tax returns for the past 3 years).	
8	<p>3 – My Productions: first subfolder “1 – FS sworn September 20, 2020- Subfolders in 1- Income</p> <p> 1- Income</p> <p>Within the income subfolder, you can put further subfolders related to your income. This includes your personal tax returns, Notices of Assessment, and Reassessment for the last three years. Depending on your situation, you may have other related documents such as pay stubs, disability stubs, social assistance statements, pension stubs, financial statements for a business, or proof of any other income sources for the past three years.</p>	<p> 1- Income</p> <ul style="list-style-type: none">  1 - Tax returns and Notices of Assessment  2 - Pay-Stub  3 - Other Employment Related Documents <p> 1 - Tax returns and Notices of Assessment</p> <ul style="list-style-type: none">  1a- 2019 my Tax Return.pdf  1b- 2018 my Tax Return.pdf  1c- 2017 my Tax Return.pdf  1d-2019 my NOA.pdf  1e- 2018 my NOA.pdf  1f- 2017 my NOA.pdf <p> 2 - Pay-Stub</p> <ul style="list-style-type: none">  1g- 2019-01-01 to 2020-01-01 Paystubs.pdf <p> 3 - Other Employment Related Documents</p> <ul style="list-style-type: none">  BenefitInformation.aspx.pdf
9	<p>3 – My Productions: first subfolder “1 – FS sworn September 20, 2020-Subfolders in 2- Expenses</p> <p> 2- Expenses</p> <p>In the expenses, subfolder, you can place all of your documents related to your expenditures. Your expenses can be organized similar to the sections in your Financial Statement. You need not keep every document. However, down the road, you may be asked questions about your expenses by your spouse’s lawyer (a process called ‘Questioning’ – Rule 20 of the Family Law Rules). Keeping the documents you used when preparing the expense section of your FS can help prepare for that step in the process.</p>	<p> 2- Expenses</p> <ul style="list-style-type: none">  Accountant Fees 2019-2020.pdf  ADT Home Security 2019-2020.pdf  Bell- Bundled Services Invoices For 2019-2020.pdf  Cell Phone for me and Kids 2019-2020.pdf  Chart of Car repairs Oil and Gas 2019-2020.pdf  Honda Car Lease Payments 2019-2020.pdf  Hydro Onelinvoices for 2019-2020.pdf  Invoice for Kids After School Fees 2019-2020.pdf  Kid's clothing Expenses 2019-2020 (2).pdf  Kid's Ski Lessons 2019-2020 (1).pdf  Kids Tutor Reciepts 2019-2020.pdf  List of 2019-2020 Grocery Charges on Sole Visa #4321.pdf  Property Tax Look-up for 123 Yonge St. Suite 401.pdf  Refrigerator Repair Dec 2019.pdf  TD Home Insurance for 2019-2020.pdf  TD List of all cheques 2019-2020.pdf

10	<p>3 – My Productions: first subfolder “1 – FS sworn September 20, 2020-Subfolders in 3-Property</p> <p> 3- Property</p> <p>It is beneficial to create three further subfiles in the ‘Property’ subfolder. Each subfolder matches the date column in the property section of your FS:</p> <ol style="list-style-type: none"> 1. For your Date of Marriage documents 2. For your Date of Separation documents 3. For Today’s Date documents <p>NOTE: Regardless of how many other financial statements you complete in your case, if you do this, you will ONLY have to create a Date of Separation and Date of Marriage subfile ONCE as those values do NOT change!</p>	<p> 3- Property</p> <ul style="list-style-type: none">  1999-07-06 Date of Marriage Documents  2020-01-01 Date of Separation Documents  2020-08-30 Today’s Date Documents
11	<p>3 – My Productions: first subfolder -1 – FS sworn September 20, 2020-Subfolder in 3-Property - Date of Marriage Documents</p> <p> 1999-07-06 Date of Marriage Documents</p> <p>In the Date of Marriage subfolder, you include all the documents related to your property and debts on your date of marriage. It is helpful to number them in the same order you have listed them in your FS.</p>	<p> 1999-07-06 Date of Marriage Documents</p> <ul style="list-style-type: none">  1-1999-07-06 BMO Sole Chequing Account #1234.pdf  2-1999-07-06 BMO Sole Savings Account .pdf  3- 1999-07-06 Ford GMC 1997 Value.pdf  4- 1999-07-06 Investors Group RRSP.pdf  5- 1999-07-06 Canada Student Loan Doc.pdf

12	<p>3 – My Productions: first subfolder “1 – FS sworn September 20, 2020-Subfolders in 3-Property- Date of Separation Documents</p> <p> 2020-01-01 Date of Separation Documents</p> <p>In the Date of Separation subfolder, you include all documents related to your property and debts on your date of separation (also known as the ‘valuation date’- the day that all of your assets and debts are valued in your net family property calculation).</p> <p>It is helpful to number them in the same order you listed them in your FS.</p>	<p> 2020-01-01 Date of Separation Documents</p> <ul style="list-style-type: none">  1a- 2019 my Tax Return.pdf  1b- 2018 my Tax Return.pdf  1c- 2017 my Tax Return.pdf  1d-2019 my NOA.pdf  1e- 2018 my NOA.pdf  1f- 2017 my NOA.pdf  1g- 2019-01-01 to 2020-01-01 Paystubs.pdf  2. CUPE Benefits Trust Booklet.pdf  3- Remax opinion for 01-01-2020.pdf  4a- Joint cheq CIBC 1234 Jan 1, 2020.pdf  4b TD Sole Savings #1212 Jan 1, 2020.pdf  4c- CIBC RRSP #567-A Jan 1, 2020.pdf  4d- RBC TFSA #899-B Jan 1, 2020.pdf  4e-ABC joint investment #5665 Jan 1, 2020.pdf  5- OMERS Family Law Value for Jan 1, 2020.pdf  5a- OMERS Family Law Value (TDSB Pensi  5b- IBM Pension - Family Law Value.pdf  6 - Great West Life Booklet.pdf  7a-CIBC RESP #0123 Jan 1, 2020.pdf  7b- TD Saving #0459 Jan 1, 2020.docx  7c - Auto-Trader Honda Odyssey2018.pdf  7d - Honda Financial Sales Agreement June 15, 2018.pdf  8- Mortgage Loan Balance Jan 1, 2020.pdf  8a -TD Unsecured LOC #011 Jan 1, 2020.pdf  8b- Joint CIBC 1433 LOC Jan 1, 2020.pdf  8b-Joint LOC statement May10-June 6, 2018.pdf  8c- CIBC Dividend Visa Infinite #6927 \$2109.70.pdf  8d- CIBC Visa #5675 .pdf  8e - Costco Sole Mastercard Jan 1, 2020.pdf  8f -PC Master card .pdf  8g-Honda Financial Services .pdf  9a - Car Depreciation Calculator -.pdf  9b - 1991 Toyota Corolla - Autotrader.pdf  10 - 2016-July 11- Gift from my Mom cheque.pdf
13	<p>3 – My Productions: first subfolder “1 – FS sworn September 20, 2020-Subfolders in 3 Property- Today’s Date Documents</p> <p> 2020-08-30 Today's Date Documents</p> <p>In the Today’s Date subfolder, you include all documents related to your property and debts for the ‘Today’s Date’ column of the FS, that being the date you are using to complete that column of this FS. It is helpful to number them in the same order as you listed them in your FS.</p>	<p> 2020-08-30 Today's Date Documents</p> <ul style="list-style-type: none">  1- House Appraisal Remax July 30, 2020.pdf  2- TD Sole Savings #1212 Aug 30, 2020.pdf  3- CIBC RRSP #567-A Aug 30, 2020.pdf  3- Remax opinion for 01-01-2020.pdf  4- RBC TFSA #899-B Aug 30, 2020.pdf  6- RESP from XYZ Aug 30, 2020.pdf  7- TD Visa Sole #4512 Aug 30, 2020.pdf  8- Mortgage Loan Balance Aug 30, 2020.pdf  9 -TD Unsecured LOC #011 Aug,30, 2020.pdf  10-PC Sole Master card #7896 Aug 30, 2020...
14	<p>4- My Spouse’s productions-</p> <p> 4 - My Spouse's Productions</p> <p>Use the same organization system outlined above for filing and organizing the documents you receive from your spouse. Again, it may be useful to have 4 separate subfiles:</p> <ol style="list-style-type: none"> 1. Income 2. Expenses 3. Property 4. Financial Statement and Certificate of Financial Disclosure 	<p> My Matrimonial</p> <p> 4 - My Spouse's Productions</p> <ul style="list-style-type: none">  1 - Income Spouse  2 - Expenses- Spouse  3 - Property- Spouse  4 - FS & CFD-Spouse

15	<h2>5 – Experts Reports</h2> <p> 5 - Expert Reports</p> <p>In your particular case, you may provide or receive an expert report addressing different issues in your case (i.e., an income report, a business valuation, a section 30 custody and access assessment, etc.). This folder gives you a place to keep all your reports in one place.</p> <p>It can be useful to either save them in date order or create a further subfile for each different type of expert report.</p>	<p> My Matrimonial</p> <p> 5 - Expert Reports</p> <p> 2020-08-18 Ex's Business Valuation Report from ABC Valuations .pdf</p>
16	<h2>6- Subfolders in 6- Litigation</h2> <p> 6 - Litigation</p> <p>The Litigation file is the main file where you can keep all of the court documents that you prepare or provide by your spouse. It can be useful to create a number of subfiles, each reflecting a step in the court process.</p>	<p> My Matrimonial</p> <p> 6 - Litigation</p> <ul style="list-style-type: none">  1- Continuing Record  2- Case Conferences & Settlement Conferences  3- Orders & Endorsements
17	<h2>6 -Litigation- Subfolders 1- Continuing Record folder:</h2> <p> 1- Continuing Record</p> <p>The Continuing Record is the name given to your court file. Most of the mandatory court forms you or your spouse must serve and file with the court are inserted in your Continuing Record.</p> <p>The Continuing Record was created to enable both you and the judge to quickly and easily locate all court forms filed by both parties. This is particularly useful when preparing for a court appearance.</p>	<p> 1- Continuing Record</p> <ul style="list-style-type: none">  1 - My Application - Form 8 Sept. 20, 2020.pdf  1A - My Affid of Service for Applic, Form 13 etc Sept 22, 2020.pdf  2 - My Form 35.1-Custody and Access Sept. 20, 2020.pdf  3 - My Financial Statement sworn Sept 20, 2020.pdf  3A -My NOA's 2017-2019.pdf  4 - Answer dated Oct. 19, 2020.pdf  4A - Affid of Service for Answer.pdf  5 - Spouse's Form 35.1 Custody & Access Oct. 19, 2020.pdf  6 - Spouse's Fin Statement sworn Oct. 16, 2020.pdf  6A - Spouses's NOA's 2017 to 2019.pdf  7 - My Reply November 16, 2020.pdf  7A - My Affid of Service for Reply Nov. 17, 2020.pdf  Cumulative Table of Contents Con't Record.docx

	<p>Since you are the Applicant, your Form 8 – Application and related documents will start the Continuing Record. When you are provided with (called ‘serve’ in legalese) your spouse’s Form 10 – Answer and related documents, they are to be added next to the Continuing Record. Each time either you or your spouse serve the other, you must provide them with an updated Continuing Record Index, reflecting the new document(s) inserted into the Continuing Record. Numbered tabs are required to separate each court form and, the tab number placed in as a divider corresponds to the document number you list on the Continuing Record Index.</p> <p>Keeping them all in one place will make your life easier when you want to look at any of the documents contained in the Continuing Record. This is particularly true when you are in court. When referring the judge to a particular form, you do so by the document name and tab number in the Continuing Record.</p>	
18	<p>6- Litigation- Subfolders in 2- Case Conferences folder:</p> <p> 2- Case Conferences & Settlement Conferences</p> <p>Throughout your case, you may have several Case Conferences. It is helpful to keep these documents in order. It can be useful to number them – so they will be saved in date order.</p>	<p> 2- Case Conferences</p> <ul style="list-style-type: none">  1-2020-01-07 Notice of Case Conference.pdf  1a 2020-01-07 My Case Conference Brief.pdf  1b 2020-01-07 Tab 1 of CC Brief NFP.pdf  1c My Affidavit of Serice for CC.pdf  1d 2020-01-07 Spouse's CC Brief.pdf  1e Court COnfirmation Form for CC Jan 7 2020.pdf
19	<p>6- Litigation- Subfolders in 3- Orders & Endorsements</p> <p> 3- Orders & Endorsements</p> <p>When you attend before a judge in a step in your case, the judge will make a court order. Initially, this court order will be either handwritten or typed by the judge. This document has a name – an endorsement. You or your spouse’s lawyer will then take that endorsement and incorporate it into a Form 25 – Order. It can be useful to number them – so they will be saved in date order.</p>	<p> 3- Orders & Endorsements</p> <ul style="list-style-type: none">  1- Case Conf Endorsement Dec 7, 2020 Goodman, J..pdf  1A - Case conf issued order of Dec 7, 2020.pdf  2 -Jan 12, 2020 motion endorsement Shore J.pdf  2A - Jan 12, 2020 motion issued order Shore, J.pdf

20	<p>A final note on your file organization:</p> <p>This type of organization will help keep you on track. When your life, as you know it is in disorder, the best thing you can do is find systems to keep you organized. Having all of your documents in one place will go a long way to minimize some of the pain.</p> <p>And remember, these are only suggestions that we have employed for many years, but as long as you keep your information together, feel free to use a system that will work best for you!</p> <p>Now go....and get yourself organized!</p> <p>Best wishes from: The Divorceability Team!</p>	
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