

INFORMATION REQUIRED FOR *Personal Injury Assessments – Self Employed*

Basic information from the plaintiff

- Date of birth.
- Date of accident.
- Date of trial or anticipated settlement date.
- Contact names and telephone numbers for the plaintiff and any business partner(s).
- Detailed resume or profile of the plaintiff's education and employment history (*Employment / Education Diary*).
- Personal tax return and attached statement of business income and expenses for at least 5 (five) years before injury to the present, and all completed financial statements since injury.
- Information regarding current year's income for plaintiff (i.e. copy of most recent pay stub).
- Information regarding current year's income for spouse/partner and/or children, if applicable.
- Spouse/partner's and children's income tax returns (if income-splitting involved).
- Information on unreported income.
- Input from plaintiff regarding business expenses that may have doubled as personal "write-offs".
- Information regarding the business' current year's income.
- Business or corporate income tax returns for at least 5 (five) years before injury to the present (if available).
- Partnership "buy-sell" agreement, if applicable, or any partnership contract.
- Documents prepared for bank loans (projected cash flows, etc.).
- Business plan (if in existence).
- Background on industry and discussion of proposed ventures, including key competitors.

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INFORMATION REQUIRED FOR *Personal Injury Assessments – Self Employed*

- Value of redundant assets, if any.
- Value of depreciated equipment immediately before point of sale (if business was wound down after injury).
- Gain on disposal of assets (if business was wound down after injury).
- Replacement wages paid to temporary help following injury, if applicable, from the accident to the present.

Supplementary Information

- Signed authorization to speak to accountant (please use attached form only).
- Plaintiff's *Examination for Discovery* transcripts or deposition transcripts.
- Current medical reports.
- Any vocational, functional capacity evaluation, or cost of care reports.

Do not send originals. Please forward copies only.

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