

## INFORMATION REQUIRED FOR *Personal Injury Assessments – Self Employed*

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### Basic information from the plaintiff<sup>1</sup>

- 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 10 (ten) years before injury to the present, and all completed financial statements *since* the incident.
- Information regarding current year's income for plaintiff (i.e. copy of most recent pay stub).
- Did business owner income-split with spouse and/or children?
- Did spouse of business owner work for business? If so, job title and hours of work per week required.
- Spouse/partner's and children's income tax returns (if income-splitting involved).
- Information on unreported income (how much per annum).
- Input from plaintiff regarding business expenses that may have legitimately doubled as personal "write-offs", but are not essential to operating the business (dollars per year).
- Information regarding the business' current year's income (interim financial statements).
- 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.

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<sup>1</sup> We do not rely upon *Examination for Discovery* transcripts of plaintiffs to obtain information about the plaintiff's employment or income history or other salient details. The decision in *Elgert v. Home Hardware Stores Limited*, 2010 ABQB 43, released Jan. 20, 2010, maintained that experts should not rely upon "full transcripts from Examinations for Discovery" because they are not evidence. (para. [17]) Instead, we prefer the documents listed in these checklists.

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- Documents prepared for bank loans (projected cash flows, etc.).
- Business plan (current – last 2 fiscal years).
- Background on industry and discussion of proposed ventures, including key competitors.
- 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, i.e., staff that would not have been hired or who worked more than s/he had prior to the incident (or did different duties and was paid more than prior to the incident).

### Supplementary Information

- Signed authorization to speak to company accountant.
- Current medical reports.

**Do not send originals. Please forward copies only.**

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