

Personal Information

Spouse's/Joint Information

Last Name		Last Name	
Given Name(s)	First Middle	Given Name(s)	First Middle
S.I.N. #		S.I.N. #	
Date of Birth	MM/DD/YYYY	Date of Birth	MM/DD/YYYY
Home Address	Street City Province Postal Code	Home Address	Street City Province Postal Code
Home Phone #		Beneficiary	DOB
Cell Phone #'s	Spouse	Beneficiary	DOB
E-mail Addresses	Spouse	Beneficiary	DOB
Driver's License #		Driver's License #	
Marital Status	Sin Mar Div Com. Law	Marital Status	Sin Mar Div Com. Law

Employment Information

Occupation	Since	Occupation	Since
Employer		Employer	
Pension Details		Pension Details	
Work Phone #		Work Phone #	
Annual Income	\$	Annual Income	\$

Financial Information

	Estimated Value		Balance	Payments
Residence Address Above	\$	Mortgage Details (Term, Holder, etc)	\$	\$
Vehicle #1 Make/Model/Year	\$	Financed By	\$	\$
Vehicle #2 Make/Model/Year	\$	Financed By	\$	\$
RRSPs	\$	Credit Cards	\$	\$
Investments	\$	Personal Loans	\$	\$
Other Assets	\$	Personal Loans	\$	\$
Other Assets	\$	Personal Loans	\$	\$
Other Assets	\$	Personal Loans	\$	\$
Other Assets	\$	Personal Loans	\$	\$
Bank & Branch	\$	Other	\$	\$
Total Assets	\$	Total Liabilities / Pmts	\$	\$
Net Worth (assets-liabilities)	\$	Insurance Pmts	\$	\$

Client Information

- 1) Do you foresee any major purchases or expenditures for which you may need funds in the near future?

- 2) At what age do you plan to retire?

Do you expect to maintain your current lifestyle throughout retirement? What, if any, additional expenses do you expect to incur after retirement? (Eg: travel, cottage, luxury items)

- 3)

- 4) Please specify all relevant pension details.

- 5) Names and dates of birth for all children and/or dependents.

- 6) Please list any major future expenses and approximate dates involving your children. (School, Marriage, etc.)

- 7) Do you have any life insurance policies or coverage?

- 8) Do you currently donate money to charity? If so, how much? Please also indicate if you plan to donate any lump sum amounts after retirement or upon death.

- 9) Miscellaneous...