

Confidential Personal Information

Name			Spouse		
Date of Birth	Spiritual	NS / S	Date of Birth	Spiritual	NS / S
Occupation	Hobby	RRSP Limit	Occupation	Hobby	RRSP Limit
Res. Phone	Address				
Bus. Phone	Email		Bus. Phone	Email	
Parents		DOB	Parents		DOB
Mother			Mother		
Father			Father		
Children	Gender	DOB	Academic	Sports	Hobby

Existing Insurance Information

Life Insured	Plan (Life, CI, DI, LTC)	Company	Amount	Year Issued	Premium

Name of your accountant: _____ Name of your lawyer: _____

Do you have a last will ? Yes / No Do you have a mandate ? Yes / No

Date: _____ Place: _____ Time: _____

Financial Needs Analysis

Assets	Amount	Expenses	Amount
Cash		1 st Mortgage or Rent	
Savings / GIC		2 nd Mortgage	
RRSP / TFSA		Property Maintenance	
RESP		Land Tax	
Stocks		Utilities (Heat, Electricity)	
Bonds / T-Bill		Telephone	
Mutual Funds		Food	
Real Estate		Clothing	
Business Value		Auto (Gas, License, etc.)	
Insurance (Cash Value)		Auto Maintenance	
Others		Public Transportation	
Total Assets: \$		Home & Auto Insurance	
		Tuition / Course Fee	
Debt		Home Care / Day Care	
Personal Loan / Car Loan		Medical	
Mortgage Outstanding		Vacation	
Rent for _____ years		Sports & Outings	
Corporate Liabilities		Gifts & Bequests	
Final Tax Payable (Capital Gain, Income Tax, RRSP)		Miscellaneous	
Others		Miscellaneous	
Total Debts: \$		Miscellaneous	
Net Worth: \$		Miscellaneous	
Income		Total Living Expenses: \$	
Monthly Gross Income:		Insurance Premiums	
You		Contribution to RESP	
Your spouse		Contribution to RRSP / TFSA	
		Contribution to Pension	
Monthly Net Income:		Payment against debts	
You		Investment	
Your spouse			
Total Family Net Income: \$		Total Expenses: \$	
Insurance Required: \$			