Your Personal and Confidential Information

Please help us prepare for this initial meeting so that we can provide you with financial advice that is important to you. We require you to fill out this info sheet as well as the attached current budget worksheet and send it to us by fax or email preferably prior to your meeting with Anthony or Frank. Your information is strictly confidential and will not be shared.

We look forward to meeting you and providing you with the services and support you need for your financial future.

PERSONAL INFORMATION

Your name	Your spouse name
Date of birth	Spousal date of birth
Occupation & # years	Occupation & # years
Annual income	Annual income
Children name & age	Children name & age
Children name & age	Children name & age
Are all the children from this marriage/relationship? If not, please provide details	
Email address	Email address
Phone number	Phone number

NET WORTH INFORMATION

ASSETS	LIABILITIES
Chequing & Savings	Personal Loans
RRSP	Student Loans
Pension	Lines of Credit
Non-registered Mutual Funds	Credit Cards
Stocks & Bonds	
Children name & age	
Home	Home Mortgage
Recreational Property	Rec Property Mortgage
Rental Property	Rental Property Mortgage
Other	Other

FINANCIAL GOALS, ISSUES & QUESTIONS TO DISCUSS AT MEETING

Goals:
Issues & Challenges
Questions or Topics you want to discuss at the meeting

PLEASE BRING ALL THE FOLLOWING ITEMS LISTED BELOW TO YOUR MEETING (if applicable)

	Statements of your investments, savings, RRSPs, Pensions etc.		Wills & Power of attorney
	Latest Notice of Assessment from Canada Revenue		List of all current outstanding debts with interest rate
	Last year tax return		Stock option documents
	Mortgage statement		Employee Benefits booklets
	Property assessment		Life insurance policies
	CPP statement		Disability insurance policies
	Defined Benefit statements		Any other financial documents we may be interested in

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