

Your Personal and Confidential Information

We want to provide you with financial advice that is important to you. Help us prepare for your initial consultation meeting by completing this Info Sheet.

Your information is strictly confidential and will not be shared.

Please note there is a minimum investable balance of \$100,000.

FINANCIAL GOALS

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PERSONAL INFORMATION

Your name	Spouse name
Email address	Email address
Phone number	Phone number
Address	
Date of birth	Spouse date of birth
Job Title / Employer	Job Title / Employer
Annual income	Annual income
Children name & age	Children name & age

NET WORTH INFORMATION

ASSETS - Account type	Balance	Institution
Chequing & Savings		
RRSP		
Spousal RSP		
TFSA		
Non-registered Mutual Funds		
Stocks & Bonds		
Pension		
Children RESP		
Home		
Recreational Property		
Rental Property		
Other		

LIABILITIES - Account type	Balance	Institution
Personal Loans		
Student Loans		
Lines of Credit		
Credit Cards		
Home Mortgage		
Rec Property Mortgage		
Rental Property Mortgage		
Other		