

Client Questionnaire

Name: _____ Date: _____

Address: _____

City: _____ Province: _____ Postal code: _____

Telephone: home (_____) _____ work (_____) _____ cell (_____) _____

Email: _____

Rate your financial objectives/priorities (1 – low, 5 – high)	1	2	3	4	5
Buy or upgrade your home					
Buy an expensive item e.g., car, boat					
Maintain estate for loved ones					
Maintain an investment/savings plan					
Start/maintain education fund for children/grandchildren					
Evaluate/initiate an insurance plan					
Reduce debt					
Retire early					
Change your job/career					
Reduce taxable income					
Maximize the growth of your money					
Develop a retirement plan					
Ensure your funds last through retirement					

Assets	Value
Registered investments (RRSPs, RRIFs)	\$
Non registered investments/savings	\$
Home	\$
RESPs	\$
Cottage	\$
Pension plan(s)	\$
Total assets:	\$
Liabilities	Value
Mortgage owing	\$
Other (auto, credit card, line of credit)	\$
Total liabilities:	\$
Net worth:	\$

Insurance	Value
Life insurance	\$
Disability insurance	\$
Income & Expenses	Value
Family income before taxes	\$
Monthly expenses	\$
Difference:	\$

Estate Planning

Do you have a Will? Yes No

Name and address of Executor:
