

	CLIENT #1	CLIENT #2 (Spouse)
Name		
Date of Birth		
S.I.N.		
Address		
City & Postal Code		
Occupation		
Employer		
Home Phone		
Business Phone		
Fax		
Email		
Drivers License		

ASSETS	Registered		
	Non-registered		
	Business		
	Other		

	Mortgage <ul style="list-style-type: none"> • <i>Balance</i> • <i>Payments</i> • <i>Interest Rate</i> • <i>Life Insured</i> • <i>Renewal Date</i> 		
	Personal Loan & Lines of Credit <ul style="list-style-type: none"> • <i>Current Debt</i> • <i>Payments</i> • <i>Interest Rate</i> 		
	Credit Cards <ul style="list-style-type: none"> • <i>Current Debt</i> • <i>Payments</i> • <i>Interest Rate</i> 		

	Employment		
	Other		

INSURANCE	Life <ul style="list-style-type: none"> • <i>Type & Amount</i> • <i>Cash Value</i> • <i>Interest Rate</i> 		
	Disability <ul style="list-style-type: none"> • <i>Amount</i> • <i>Premium</i> 		
	Critical Illness <ul style="list-style-type: none"> • <i>Amount</i> • <i>Premium</i> 		
	Smoking Status		

	MONTHLY	ANNUALLY
Housing <ul style="list-style-type: none"> • Mortgage Payment • Utilities • Property Insurance • Property Taxes • Other 		
Family Care <ul style="list-style-type: none"> • Groceries • Personal Care/Cash • Other 		
Clothing <ul style="list-style-type: none"> • Purchases • Dry-Cleaning 		
Transportation <ul style="list-style-type: none"> • Auto Payments • Auto Insurance • Gas, Parking, Repairs • Public Transport 		
Insurance <ul style="list-style-type: none"> • Life Insurance • Disability Insurance • Health Insurance 		
Entertainment <ul style="list-style-type: none"> • Vacations • Dining Out • Memberships • Gifts • Other 		
Savings <ul style="list-style-type: none"> • RRSP • Pension Plan • Other 		
Debt Repayment <ul style="list-style-type: none"> • Mortgage • Loans • Lines of Credit • Credit Cards • Other 		
Donations <ul style="list-style-type: none"> • Charity #1 • Charity #2 • Charity #3 		

	Dependant #1	Dependant #2	Dependant #3	Dependant #4
Name				
Relationship				
Date of Birth				

COMMENTS	
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