

PERSONAL FINANCIAL PLANNING**CONFIDENTIAL DATA****DATED:**

Name		Social Insurance No.	
Home Address			
Place of Birth		Date of Birth	Res. Phone
Title	Bus. Phone		
Company Name			
Business Address			
Organizational Structure			
Close Business Associates			
Education History			
Employment History			
Plans for Future Employment			
Hobbies, Interests Clubs, Sports, etc.			
Name of Spouse			Formerly
Place of Birth		Date of Birth	Social Insurance No.
Marriage	Date:	Place	Matrimonial Regime
Education History			
Employment History			
Plans for Future Employment			
Close Friends			
Children			Birthdate
			Birth Cert. Received
Guardians & Special Considerations			
Wills	His: Dated:	Place	Hers: Dated: Place
Name of Executor(s)			
Trusts			
Trustee(s)			
Location (s) of Family Documents			

Income Self And Spouse	Source	20	20	20	20	20
INVESTMENT PHILOSOPHY						
Savings Plans						
And						
Methods						

ASSETS NOT AVAILABLE TO PRODUCE INCOME

Cash, Bank Chequing					
Residence					
Household Furnishings					
Automobiles					
Recreation & Hobby equipment					
Other					
Total					

ASSETS AVAILABLE TO PRODUCE INCOME

Cash, Bank Savings					
Real Estate					
Securities, etc.					
RRSP's					
Company Pension (Vested)					
Business Interest					
Other					
Total Available Assets					

LIABILITIES

Mortgage							
Loans, Bank & Others							
Total Liabilities							
Life Insurance	Life Assured	Company	Amount	Plan	Date Issued	Premium	Beneficiary
Personal							
Including							
Family							
Lump Sum							
Death							
Benefit							
C.P.P./							
Q.P.P.							

Disability Income Insurance	Insured	CO. & NO.	Monthly Benefit	Payment Period	Elimination Period	Lifetime Injury	Partial Disability	A.D.B.	R.P.	Beneficiary
Employee Benefits		Group Life								
		Disability Plan								
		Medical Plan								
		Pension Plan								
		D.P.S.P.'s								
		Dental								
R.R.S.P.'s										
FAMILY BUDGET				INCOME		CAPITAL ANALYSIS				
Net Income, Self						YOUR OBJECTIVES				
Net Income, Spouse						CASH NEEDS				
Total Net Income Family				\$ (A)		Last Expenses				
EXPENSES						Mortgage Fund				
Housing (P.I.T.)						Other Debts				
Utilities (Heat, Light, Phone, etc.)						Emergency Fund				
Food						Education Fund				
Clothing						TOTAL CASH NEEDS			\$	
Auto (gas, Expenses, INSCE, etc.)						Family Income Needed			\$	
Insurance, Life						Less: C.P.P. Survivor's Benefits				
Family (Lessons, Fees, etc.)						Other Income				
Entertainment, Vacation, Clubs						Total Income Provided			\$	
Miscellaneous						Balance Still Needed			\$	
Debt Reduction						SUMMARY				
Savings, Excluding Life Insurance						Total Assets & Insurance				
Total Expenses		\$ (B)		Less Cash Needs						
						Available to Produce Income			\$	
						Income Provided by this @		% \$	
						Income Shortage			\$	
Income Available (A-B)		\$ (C)		New Capital Still Needed @		% \$			
INTEREST ASSUMPTIONS										
INTEREST EARNED ON INVETMENT AFTER TAXES				%					
EXPECTED RATE OF INFLATION					_____%					
NET INTEREST AVAILABLE					_____%					

Parents, Ages, Addresses Health, Occupations, etc.	
Brothers and Sisters	
Parents of Spouse	
Brothers and Sisters Of Spouse	
Potential Dependents	
Bequests – Charitable Religious, etc.	
Medical History, Self and Family	Non-Smoker/Smoker
Aviation, Racing, Special Avocations, Hobbies, etc.	
PROFESSIONAL ADVISERS	Physician
	Dentist
	Banker
	Lawyer
	Accountant
	Stock Broker
	Trust Officer
	General Ins. Agent
	Personal Advisor
	Other
OBJECTIVES MEDIUM RANGE 2 TO 5 YEARS	
OBJECTIVES MEDIUM RANGE 6 TO 15 YEARS	
OBJECTIVES LONG RANGE 16 YEARS OR MORE	
RETIREMENT PLANS OTHER	