

INTRODUCTORY FORM



Financial Overview

In order to take full advantage of your time and provide you with the best information for your one-on-one money coaching sessions, please complete this form in full. This information will be kept strictly confidential.

Personal Information

Name _____ Date of Birth _____

Place of Work _____ Type of Work _____

Annual Gross Income _____ Take Home Pay _____ Every _____

Spouse's Name _____ Date of Birth _____

Place of Work _____ Type of Work _____

Annual Gross Income _____ Take Home Pay _____ Every _____

Financial Information Summary

Home Phone _____ Email 1: _____ Email 2: _____

Address _____

Street _____ City _____ Province _____ Postal Code _____

How many dependants living at home? _____ Ages? _____ Do you rent or own your home? _____

Mortgage/Rent payment? _____ / _____ Approx. value of home? _____ Mortgage Balance? _____

Any car payment(s) (amounts)? _____ / _____ / _____

Total value of family's: RRSPs? _____ Pensions? _____ RESPs? _____ Other Investments/Property? _____

Do you have a working monthly budget? _____ Do you track your monthly expenses (how)? _____

Did you receive a tax refund last year? _____ If so, how much? _____

How much are you saving for Retirement per year (including Employer contributions, Pensions, RRSPs)? _____

How much are you savings for Children's Education per year? _____

How much are you saving in other investments per year? _____

What is the approximate total of all other debt (student/personal loans, credit cards, lines of credit, etc.)? _____

Do you have any life insurance (type/amounts)? _____

Do you have updated Will(s)? _____

Your Financial Priorities

In order to best customize our agenda to meet your needs, please rank the areas you would like to focus on (#1 being highest down to whatever you would like to cover)

- Developing a Cash Flow Plan (Budget)
 - Eliminating Personal Debt
 - Establishing an Emergency Fund
 - Estate Planning
 - Building Net Worth/Retirement Planning
 - Education Planning/Projections
 - Appropriate Insurance Coverage
 - Forming Good Money Habits for Children
 - Understanding Investing
 - Investment Portfolio Review
 - Improving Your Relationship with Money
 - Educating Yourself on Financial Matters
 - Other
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Additional Comments
