



	Spouse 1	Spouse 2
<b>Personal Information</b>		
Name:		
Birthday:		
Target retirement:		

	Name:	Age:
Child 1		
Child 2		
Child 3		
Child 4		
Child 5		

	Spouse 1	Spouse 2
<b>Work:</b>		
occupation (What do you do?)		
Are you self employed?		
Do you plan to work in retirement?		
- provide as much detail as possible about your plans to work in retirement		
Other notes or comments about potential future changes or opportunities to work:		



	Spouse 1	Spouse 2
<b>Income:</b>		
What is your gross annual income?		
What is your net paycheques? Please provide a paystub if applicable		
Please provide copies of your personal tax returns, notice of assessments and any corp returns (if applicable)		

<b>Expenses:</b>	
How much you spend on a monthly basis? The more accurate you are, the better the planning. Please provide a budget or spending analysis if applicable.	
Do you feel like you are overspending, spending within you means or living paycheque to paycheque?	
Will your mortgage be paid off by the time you retire?	
Will you be debt free by retirement?	
Will you still have dependents in retirement?	
Do you think your expenses will increase, decrease or stay the same in retirement?	
What do you think will be your biggest expense in retirement?	
What is your biggest expense now?	
Do you think you will have enough money in retirement to meet your needs?	
How much do you save for long term every month?	
- into RRSP	
- into TFSA	
- into non-RRSP	
Do you have any concerns about spending? If so, what are your concerns?	





**Savings and investments: please provide recent statements. In the boxes below provide a summary amount for each spouse broken down by category**

	Spouse 1	Spouse 2
RRSPs		
TFSA		
Non-RRSP		
Do you have a pension plan through work?		
- What kind of pension and how much is in your pension?		
- How much do you contribute?		
Do you have a group RRSP savings plan through work?		
- Does your employer match contributions?		
- if so, how much?		
Do you have any specific questions regarding your investments?		

	Spouse 1	Spouse 2
<b>Estate Planning:</b>		
Do you have a Will? When was it last update?		
Do you have a power of attorney?		
Do you have a personal directives?		
Who are the beneficiaries of your estate?		
Do you have any questions or concerns with respect to estate planning?		

