

PERSONAL INFORMATION

	Client	Spouse
Complete name		
SIN		
Birthdate and gender	[] M [] F	[] M [] F
Marital status	[] Married [] Single [] Divorced [] Separated [] Common law spouse [] Civil union [] Widowed Since:	[] Married [] Single [] Divorced [] Separated [] Common law spouse [] Civil union [] Widowed Since:
Address	Home:	
	Office:	
	Other:	
Phone number	Home: Office:	Home: Office:
	Mobile: Other:	Mobile: Other:
Email address	Main:	Main:
	Second:	Second:
Job title	Since:	Since:
Employer		

	Complete name	Birthdate	✓	Complete name	Birthdate	✓
Children and dependents <i>(Only check the box if you are responsible for this person)</i>						

ADDITIONAL INFORMATION

	Client	Spouse
Yearly revenue	Estimated tax rate: [] %	Estimated tax rate: [] %
	Yearly gross revenue: \$[]	Yearly gross revenue: \$[]
	Biweekly net revenue: \$[]	Biweekly net revenue: \$[]
Other income		
Unused RRSP	\$[] Updated:	\$[] Updated:
Unused TFSA	\$[] Updated:	\$[] Updated:
Language	[] French [] English [] Other:	[] French [] English [] Other:
Mandate in case of incapacity	[] Yes [] No	[] Yes [] No
Marriage contract	[] Yes [] No	[] Yes [] No
	Matrimonial regime: [] Partnership of acquests [] Separation as to property [] Community of property [] Other	
Will	Notary:	Notary:
	[] Yes [] No	[] Yes [] No
	Review:	Review:
	Type: [] Holograph [] Before witnesses [] Notarial	Type: [] Holograph [] Before witnesses [] Notarial
	Notary:	Notary:

COMMENTS

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Balance sheet

Assets		Can be converted to liquid at death ✓ Can be converted to liquid at death ✓		Total
Non-registered investments				
Mutual funds				
Segregated funds				
Stocks				
GIC				
Bank account				
Other non-registered				
Bonds				
Total non registered investments				
Registered investments				
RRSP, LIRA, RRIF, LIF	<input type="checkbox"/>		<input type="checkbox"/>	
TFSA	<input type="checkbox"/>		<input type="checkbox"/>	
Pension plan	<input type="checkbox"/>		<input type="checkbox"/>	
Group plan	<input type="checkbox"/>		<input type="checkbox"/>	
Total registered investments				
Capital assets				
Main residence	<input type="checkbox"/>		<input type="checkbox"/>	
Second residence	<input type="checkbox"/>		<input type="checkbox"/>	
Real property	<input type="checkbox"/>		<input type="checkbox"/>	
Business	<input type="checkbox"/>		<input type="checkbox"/>	
Total capital assets				
Other assets				
Furniture	<input type="checkbox"/>		<input type="checkbox"/>	
Vehicle	<input type="checkbox"/>		<input type="checkbox"/>	
Total other assets				
Total assets				
Liabilities		Insured ✓	Insured ✓	Total
Mortgage	<input type="checkbox"/>		<input type="checkbox"/>	
Car loan	<input type="checkbox"/>		<input type="checkbox"/>	
Personal loan	<input type="checkbox"/>		<input type="checkbox"/>	
Credit card/Line of credit	<input type="checkbox"/>		<input type="checkbox"/>	
Guarantee	<input type="checkbox"/>		<input type="checkbox"/>	
Commercial liabilities	<input type="checkbox"/>		<input type="checkbox"/>	
Tax	<input type="checkbox"/>		<input type="checkbox"/>	
Total liabilities				
Net worth				