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# FINANCIAL PLANNING QUESTIONNAIRE

INFORMATION TO BRING TO YOUR FIRST MEETING

*Financial Planning For a Balanced Lifestyle*

## ***FINANCIAL PLANNING QUESTIONNAIRE***

*For use at your meeting with Blair Corkum Financial Planning Inc.  
Contact: Blair Corkum, CPA, CA, R.F.P., CFP, CFDS, CLU, CHS*

This questionnaire is a guide only. You need not answer all questions but additional information may allow us to help you more. **Item # 11 and 12 are essential.** Bring this form to your counselling session together with your most recent personal tax return, as well as any recent employer pension, CPP and investment / RRSP statements that may relate to your questions. *All information will be held in confidence*

1. Name / Age

	Title	Preferred First Name	Last Name	Occupation	Birth date
Person #1					
Person #2					

2. Address

Mailing address			
Email address			
Home Phone		Other Phone	

3. Children

Name	Birth date	Marital Status	Living at Home?

4. Other persons for whom you provide support

Name	Relationship	Age	Annual Support you Provide

5. Describe any major expenditures you plan to make in the next five years (tuition fees, vehicles, vacations, house purchases, etc.)

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6. When did you last review and update your:

- a. life insurance policies? \_\_\_\_\_  
b. disability insurance policies? \_\_\_\_\_

If you wish to discuss these, please bring them to our meeting, along with details of any coverage provided by your employer.

7. Are you planning for your children to go to college or university? Have you established university/college funds for your children?

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8. When did you last review your Will? Do you have a Power of Attorney?

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9. Provide an estimate of how much you spend each month on:

- a. living expenses, except loans \_\_\_\_\_  
b. loan payments (total of all) \_\_\_\_\_

10. Provide information related to your employer pension plans (if relevant to our meeting discussion topics):

- |   | Person 1 | Person 2 |
|---|----------|----------|
| a. Expected monthly pension from retirement until age 65: | _____    | _____    |
| b. Expected monthly pension after age 65:                 | _____    | _____    |

If you have a recent Canada Pension Plan statement, please bring it with you.

11. What are your plans/concerns/questions regarding distribution of your assets on death?

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12. List your most important questions or concerns that you would like answered regarding tax, insurance, investing, or other financial planning matters.

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**Summary of Financial Data**

Please provide the following information to the best of your ability. Please use your estimate of current values.

	Person #1 \$	Person #2 \$	Joint \$
<b>A. ASSETS</b>			
<b>Liquid Assets</b>			
Cash	_____	_____	_____
Short-term Investments	_____	_____	_____
_____	_____	_____	_____
<b>Personal Assets</b>			
House	_____	_____	_____
Cottage - today's value	_____	_____	_____
- cost, including improvements	_____	_____	_____
Furnishings	_____	_____	_____
Vehicles	_____	_____	_____
Other Personal Assets (Boat, Art, Antiques- list)	_____	_____	_____
<b>Investment Assets (or attach statements) (see note below)</b>			
RRSP - Self	_____	_____	_____
Spousal RRSP – List under person entitled to draw	_____	_____	_____
Tax Free Savings Accounts	_____	_____	_____
Registered Education Savings Accounts	_____	_____	_____
Canada Savings Bonds / Term deposits / GICs	_____	_____	_____
Stocks / Mutual Funds / Other equities*	_____	_____	_____
Land and real estate, including rental properties*	_____	_____	_____
Other Assets (list on an attached sheet)*	_____	_____	_____

\*Note: Attach a list of values and original costs for property and for investments outside of your RRSP if you wish to discuss capital gain tax issues.

Interest rate	Person #1 \$	Person #2 \$	Joint \$
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**B. LIABILITIES (Note)**

**Short-term Obligations**

Credit Cards	_____	_____	_____	_____
Personal Loans / Credit Lines (note)	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Loans to Purchase Personal Assets (show interest rates)(note)**

Mortgage for Personal Use	_____	_____	_____	_____
Car Loans	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Investment Loans (show interest rates)(note)**

Bank Loans to buy Investments	_____	_____	_____	_____
Mortgages to buy Investments	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Note: For each loan, provide as much detail as you can, including interest rate, payment amount, how often you make each payment, and when the last payment will be made.**

**C. Income**

We can obtain this information from your tax returns, but please provide details of any expected changes. If working, please provide your normal annual salary before deductions:

Person #1 \_\_\_\_\_  
 Person #2 \_\_\_\_\_