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PRIVATE AND CONFIDENTIAL

FINANCIAL PLANNING QUESTIONNAIRE

For use at your meeting with Blair Corkum Financial Planning Inc.

Contact: Blair Corkum, FCPA, CA, R.F.P., CFP®, CFDS, CLU, CHS

This questionnaire is a guide only — you need not answer every question, but additional information may allow me to help you more. **Item #13 is essential.** Please bring this form to our meeting together with your most recent personal tax return, as well as any recent employer pension, CPP, and investment/RRSP statements relevant to your questions. *All information will be held in strict confidence.* Materials may be brought to an in-person meeting; for telephone or video meetings, please forward them in advance.

1. Name / Age

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

2. Address

Mailing address

Email – Person 1

Email – Person 2

Home Phone

Work Phone #1 | Cell Phone #1

Work Phone #2 | Cell Phone #2

3. Children

Name	Birth date	Marital Status	Living at Home?

4. Other persons for whom you provide support (including caregiving)

Name	Relationship	Age	Annual Support Provided

5. Describe any major expenditures you plan to make in the next five years (tuition fees, vehicles, vacations, house purchases, etc.) (attach an additional sheet if you need more room)

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 your policies to our meeting, along with details of any coverage provided by your employer.

7. Are you planning for your children to attend college or university? Have you established education funds for them?

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

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

a. living expenses, except loans

b. loan payments (total of all)

Please provide the payment amounts, interest rates, and "paid off" dates for loans in the Liabilities section on page 4.

10. Provide information related to your employer pension plans upon retirement (not CPP and OAS), if relevant to our meeting discussion topics:

	Person #1	**Person #2**
a. Actual/expected work pension before age 65:		
b. Actual/expected work pension at age 65 or over:		

11. Are you receiving Canada Pension Plan? If so, what is the monthly pension before tax withholdings; if not, what pension do you expect to receive if you start drawing at age 65?

Person 1: Person 2:

Age started / planning to start: Person 1: Person 2:

12. What are your plans, concerns, or questions regarding distribution of your assets on death, especially your home and real estate? (attach an additional sheet if you need more room)

13. **List your most important questions or concerns that you would like answered regarding tax, insurance, investing, or other financial planning matters.** (attach an additional sheet if you need more room)

SUMMARY OF FINANCIAL DATA

Please provide the following information to the best of your ability. Attach additional sheets if necessary to provide details. Please use your estimate of *current values*. This is meant as a high-level summary — if you wish, bring your statements to our meeting and we will review the details together.

A. ASSETS

	Person #1 $	Person #2 $	Joint $
Liquid Assets			
Cash, Chequing and Savings Accounts			
Short-term Investments (under one year or cashable GICs)			
Other:			
Personal Assets			
House			
Cottage – today's value			
– cost, including improvements			
Vacant Land			
Vehicles			
Other Personal Assets (boat, art, antiques – list)			
Investment Assets (or attach statements) — see note below			
RRSP – Self			
Spousal RRSP – list under person entitled to draw			
Tax-Free Savings Accounts (TFSA)			
First Home Savings Accounts (FHSA)			
Registered Education Savings Accounts (RESP)			
Term Deposits / GICs (not in TFSA, RRSP/RRIF, FHSA)			
Stocks / Mutual Funds / Other Equities (not in TFSA, RRSP/RRIF, FHSA) *			
Other Real Estate, including rental properties *			
Other Assets (list on an attached sheet) *			

* *Note: Please attach a list of values and original costs for property and for investments outside your RRSP if you wish to discuss capital gains tax issues. If you inherited property, note to which person the gift was made in the Will or gift documentation (Person #1, Person #2 or jointly), and what its market value was at the time of receipt.*

B. LIABILITIES *(see note below)*

	Interest Rate	Person #1 $	Person #2 $	Joint $
Short-term Obligations (record interest rate and maturity date, if applicable)				
Credit Cards (only if not paid off monthly)				
Personal Loans / Credit Lines				
Other:				
Other:				
Loans to Purchase Personal Assets (show interest rates)				
Mortgage for Personal Use				
Car Loans				
Other:				
Other:				
Loans to Earn Income (show interest rates)				
Loans to buy Investments/Real Estate				
Mortgages to buy Investments/Real Estate				
Other:				
Other:				

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

C. INCOME

I 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, and your taxable income from your tax return (line 26000).

Person #1: Gross Annual Salary		Taxable Income	
Person #2: Gross Annual Salary		Taxable Income	