

FULL NAME:		DATE OF BIRTH			S.I.N. #:
EMPLOYER:		CONTACT NAME / PHONE NO.: /			
POSITION HELD:	TIME WITH EMPLOYER:		MONTHLY INCOME: \$		
SPOUSE'S FULL NAME:		DATE OF BIRTH			S.I.N. #:
EMPLOYER:		CONTACT NAME / PHONE NO.: /			
POSITION HELD:	TIME WITH EMPLOYER:		MONTHLY INCOME: \$		
ADDRESS:	CITY & PROV:		POSTAL CODE:		

FINANCIAL POSITION

ASSETS	AMOUNT	LIABILITIES	AMOUNT
CASH	\$	REAL ESTATE LOANS (SCH 2)	\$
R.R.S.P.'S (SCH 1)	\$	FINANCIAL INST'N (SCH 4)	\$
REAL ESTATE (SCH 2)	\$	TAXES (INCOME/REAL ESTATE)	\$
VEHICLES (SCH 3)	\$	OTHER LIABILITIES (SPECIFY)	\$
OTHER ASSETS (SPECIFY)	\$	OTHER LIABILITIES (SPECIFY)	\$
TOTAL ASSETS	\$	TOTAL LIABILITIES	\$
LESS TOTAL LIABILITIES	(\$)		
TOTAL NET WORTH	\$		

SCHEDULE 1 – R.R.S.P'S

DESCRIPTION:	WHERE HELD:
DESCRIPTION:	WHERE HELD:

SCHEDULE 2 – REAL ESTATE

ADDRESS OF PROPERTY:		TITLE IN NAME OF:		
MARKET VALUE: \$	OWING: \$	EQUITY: \$	PYMT: \$	INCOME: \$
ADDRESS OF PROPERTY:		TITLE IN NAME OF:		
MARKET VALUE: \$	OWING: \$	EQUITY: \$	PYMT: \$	INCOME: \$

SCHEDULE 3 – VEHICLES

MAKE:	MODEL:	YEAR:	MARKET VALUE: \$
MAKE:	MODEL:	YEAR:	MARKET VALUE: \$
MAKE:	MODEL:	YEAR:	MARKET VALUE: \$

