



LATITUDE

WEALTH MANAGEMENT

A GREATER DEGREE OF FREEDOM

Date _____

General Information

Name	DOB	S/NS

Children's Names	DOB

Address _____

Phone# _____

Email _____

Mortgage Balance _____

Interest Rate _____

Renewal date _____

	Employer	Occupation	Phone	SIN
You				
Spouse				

You

SPOUSE

Face Amount	Company	Type	Premium	Face Amount	Company	Type	Premium
Total				Total			

DI	Mo. Ben.	Company	Type	Premium	EP	BP

Expiration Date _____ Car _____

Home _____

Annual income _____

Spouse's Annual Income _____

RPP _____

RPP _____

RRSP _____

RRSP _____

Where _____

Where _____

How do you save money WK MTH YR

Amount that can be set aside _____ mo.



Cash Flow Statement

INCOME			
Salary			
Investment Income			
Other			
TOTAL INCOME			
EXPENSES			
Income Tax			
Housing (rent/mortgage)			
Food			
Utilities			
Insurance Premiums			
Transportation (fuel, insurance, repairs)			
Loans			
Credit Cards			
Other (daycare, house cleaning)			
Vacations			
Registered Retirement Savings Plans			
Non Registered Investments			
TOTAL EXPENSES			
NET CASH FLOW			

NET WORTH STATEMENT

ASSETS			
Cash			
Canada Savings Bonds			
Term Deposits			
Non Registered Investments			
Cash Value Life Insurance			
Registered Retirement Savings Plans			
Registered Pension Plans			
Registered Education Savings Plan			
Personal Residence			
Other Properties			
Cars, Boats, RV's			
Other Personal Assets			
TOTAL ASSETS			
LIABILITIES			
Home Mortgage			
Other Mortgages			
Credit Cards			
Loans			
Other Debts			
TOTAL LIABILITIES			
NET WORTH			

