

# CLIENT INFORMATION FORM

**INFORMATION**

FIRST NAME

LAST NAME

DATE OF BIRTH

PHONE

EMAIL

CITY

STREET

PROVINCE

POSTAL CODE

**CLIENT**


**SPOUSE/PARTNER**


**INCOME**

CLIENT

TAKE HOME PAY

NUMBER OF PAYS PER YEAR

SPOUSE

TAKE HOME PAY

NUMBER OF PAYS PER YEAR

RENTAL INCOME

CHILD BENEFITS

PENSION

OTHER


**DEBTS**

TYPE (EG. CREDIT CARD)	LENDER	LIMIT	BALANCE	INTEREST RATE	PAYMENT

# CLIENT INFORMATION FORM

## MORTGAGE

MORTGAGE/LINE OF CREDIT	<input type="text"/>
HOME VALUE	<input type="text"/>
BALANCE	<input type="text"/>
INTEREST RATE	<input type="text"/>
PAYMENT & FREQUENCY	<input type="text"/>
RENEWAL DATE	<input type="text"/>
VARIABLE OR FIXED	<input type="text"/>
ORIGINAL AMORTIZATION	<input type="text"/>

## EXPENSES

### HOUSING

MORTGAGE	<input type="text"/>
CELLPHONE	<input type="text"/>
CONDO FEES	<input type="text"/>
HEAT	<input type="text"/>
HOUSE INSURANCE	<input type="text"/>
MAINTENANCE	<input type="text"/>
PHONE/INTERNET/CABLE	<input type="text"/>
POWER/HYDRO	<input type="text"/>
PROPERTY TAX	<input type="text"/>
OTHER	<input type="text"/>

### TRANSPORTATION

GAS	<input type="text"/>
MAINTENANCE/REPAIRS	<input type="text"/>
PARKING	<input type="text"/>
PUBLIC TRANSIT/TAXI	<input type="text"/>
TOLLS	<input type="text"/>
VEHICLE INSURANCE	<input type="text"/>
VEHICLE LEASE	<input type="text"/>
VEHICLE LOAN	<input type="text"/>
OTHER	<input type="text"/>
	<input type="text"/>

### FINANCIAL OBLIGATIONS

DEBT PAYMENTS	<input type="text"/>
ALIMONY/CHILD SUPPORT	<input type="text"/>
CHILD CARE	<input type="text"/>
DISABILITY INSURANCE	<input type="text"/>
HEALTH INSURANCE	<input type="text"/>
INTEREST/FEES (OVERDRAFT/BANK FEES)	<input type="text"/>
LIFE INSURANCE	<input type="text"/>
RRSP	<input type="text"/>
TFSA	<input type="text"/>

### DAILY LIVING

CLEANING	<input type="text"/>
CLOTHING	<input type="text"/>
ENTERTAINMENT/EATING OUT	<input type="text"/>
FITNESS	<input type="text"/>
GIFTS	<input type="text"/>
GROCERIES	<input type="text"/>
HOBBIES	<input type="text"/>
PETS	<input type="text"/>
TRAVEL	<input type="text"/>
OTHER	<input type="text"/>
OTHER	<input type="text"/>
OTHER	<input type="text"/>

# CLIENT INFORMATION FORM

**ASSETS**

NAME	PURPOSE	PURCHASE PRICE	CURRENT VALUE

**WHY ARE YOU INTERESTED IN A CASH FLOW PLAN?**

**WHAT IS MOST IMPORTANT TO YOU ABOUT YOUR MONEY?**

**WHAT ISN'T WORKING FOR YOU RIGHT NOW WHEN IT COMES TO YOUR MONEY?**