



# 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"/>

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## ASSETS

NAME	PURPOSE	PURCHASE PRICE	CURRENT VALUE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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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?