

CLIENT INFORMATION FORM

INFORMATION	CLIENT		SPC	OUSE/PARTNER	
FIRST NAME					
LAST NAME					
DATE OF BIRTH					
PHONE					
EMAIL					
CITY					
STREET					
PROVINCE					
POSTAL CODE					
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) LENI	DER	LIMIT	BALANCE	INTEREST RATE	PAYMENT

For the use of CCS™ professionals **ONLY**. For a listing of CCS™ Professionals, visit the CCS™ Directory at **www.cashflow-specialist.com**.



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MORTGAGE	
MORTGAGE/LINE OF CREDIT	
HOME VALUE	
BALANCE	
INTEREST RATE	
PAYMENT & FREQUENCY	
RENEWAL DATE	
VARIABLE OR FIXED	
ORIGINAL AMORTIZATION	
EXPENSES	
HOUSING	FINANCIAL OBLIGATIONS
MORTGAGE	DEBT PAYMENTS
CELLPHONE	ALIMONY/CHILD SUPPORT
CONDO FEES	CHILD CARE
HEAT	DISABILITY INSURANCE
HOUSE INSURANCE	HEALTH INSURANCE
MAINTENANCE	INTEREST/FEES (OVERDRAFT/BANK FEES)
PHONE/INTERNET/CABLE	LIFE INSURANCE
POWER/HYDRO	RRSP
PROPERTY TAX	TFSA
OTHER	
	DAILY LIVING
TRANSPORTATION	CLEANING
GAS	CLOTHING
MAINTENANCE/REPAIRS	ENTERTAINMENT/EATING OUT
PARKING	FITNESS
PUBLIC TRANSIT/TAXI	GIFTS
TOLLS	GROCERIES
VEHICLE INSURANCE	HOBBIES
VEHICLE LEASE	PETS
VEHICLE LOAN	TRAVEL
OTHER	OTHER
	OTHER
	OTHER



CLIENT INFORMATION FORM

ASSETS			
NAME	PURPOSE	PURCHASE PRICE	CURRENT VALUE
WIN ARE VOLUNTERECTER	NINI A CASU ELOW BLANC		
WHY ARE YOU INTERESTED	IN A CASH FLOW PLAN?		
WHAT IS MOST IMPORTANT	T TO YOU ABOUT YOUR MONEY?		
WHAT ISN'T WORKING FOR	R YOU RIGHT NOW WHEN IT COMES TO YOU	R MONEY?	