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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



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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"/>

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"/>

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"/>

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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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?