

Client name:

Co-Client name:

BASIC LIVING/LIFESTYLE

Rent	\$
Utilities (heat, hydro, water)	\$
Telephone/cell phone	\$
Cable/satellite/streaming subscription	\$
Internet service	\$
Property taxes	\$
Home insurance	\$
Maintenance/repairs/condominium fees	\$
Groceries	\$
Personal hygiene (haircuts, etc.)	\$
Clothing (purchase, cleaning)	\$
Car lease	\$
Auto insurance	\$
License/registration	\$
Gas/oil/repairs	\$
Parking/taxi/bus	\$
Glasses/contacts/optometrist fees	\$
Dental	\$
Prescriptions/non-prescription drugs	\$
Health insurance premiums	\$
Dining out	\$
Movies/theatre	\$
Newspaper/magazines/digital subscription	\$
Sports activities/hobbies	\$
Gym membership	\$
Travel/vacation	\$
Membership fees	\$
Professional dues	\$
Dependent support	\$
Gifts	\$
Donations	\$
Pet care	\$
Other	\$
SUBTOTAL	\$

LIFE & HEALTH INSURANCE

Life insurance premiums	\$
Critical illness premiums	\$
Disability premiums	\$
Long-term care premiums	\$
Other	\$
SUBTOTAL	\$

DEBT PAYMENTS

Mortgage	\$
Car loan	\$
Credit Card	\$
Line of Credit	\$
Other	\$
SUBTOTAL	\$

SAVINGS

Tax-Free Savings Account (TFSA)	\$
RRSP	\$
Registered Education Savings Plans (RESPs)	\$
Emergency fund	\$
Other	\$
SUBTOTAL	\$

AVAILABLE MONTHLY RESOURCES

Client's net (after-tax) monthly income	\$
Co-Client's net (after-tax) monthly income	\$
Net monthly income	\$

EXPENSES

A) Basic living/lifestyle	\$
B) Life & health insurance	\$
C) Debt payments	\$
D) Savings	\$
Total monthly expenses	\$
= AVAILABLE RESOURCES	\$

NOTES

Respecting your privacy

Our Purpose is to help our Clients achieve lifetime financial security and live healthier lives. We collect, use and disclose your personal information to: develop and deliver the right products and services; enhance your experience and manage our business operations; perform underwriting, administration and claims adjudication; protect against fraud, errors or misrepresentations; tell you about other products and services; and meet legal and security obligations. We collect it directly from you, when you use our products and services, and from other sources. We keep your information confidential and only as long as needed. People who may access it include our employees, distribution partners such as advisors, service providers, reinsurers, or anyone else you authorize. At times, unless we're prohibited, they may be outside your jurisdiction and your information may be subject to local laws. You can always ask for your information and to correct it if needed. In most cases, you have a right to withdraw your consent, but we may not be able to provide the requested product or service.

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