Client Profile

CLIENT INFORMATION REQUEST

Below is a list of information that you are required to bring to our initial appointment. Any personal information disclosed to Apryl Egger of Stone City Financial is held in the strictest of confidence.

Client Name ______________________________ **Phone** ____________________

REQUIRED INFORMATION

1. Originals of any personal insurance policies (mortgage, life, car, home disability)	Yes ☐	No ☐
2. RRSP Contribution limits (Your most recent Revenue Canada Assessment form)	Yes ☐	No ☐
3. Tax Free Savings Account statements	Yes ☐	No ☐
4. Employment retirement packages and group benefit plans	Yes ☐	No ☐
5. Personal RRSP's (Individual Plans and Spousal RRSP Plans)	Yes ☐	No ☐
6. Non-registered Assets (including GIC investments, Bonds, Savings Accounts)	Yes ☐	No ☐
7. Major Credit liabilities (Credit Cards, loans, credit lines, etc.)	Yes ☐	No ☐
8. Home and other property (purchase and present value)	Yes ☐	No ☐
9. Outstanding Mortgage balances, current mortgage statement	Yes ☐	No ☐
10. Business Assets you own	Yes ☐	No ☐
11. Wills and Powers of Attorney	Yes ☐	No ☐

Notes:

____

____

____

____