Financial Data Form

PERSONAL & CONFIDENTIAL

Bellwether FAMILY WEALTH

PERSONAL DATA

	Spouse A	Spouse B
Name		
Date of Birth		
Retirement Status/Plan		
Employer		
Years With Employer		
Cell Phone		
Address		
Email Address		
Home Phone		

PRIORITIES

(1=low priority; 5=high priority)

What are your pressing needs for Retirement Planning?

1. Debt Management
2. Retirement Savings and Income
3. Pension Planning
4. Retirement Lifestyle
5. Estate Planning
6. Taxation

GOALS

What are your financial goals and dreams? For example you may want to retire debt-free, buy a motorhome or travel the world.

Goal #1	
Goal #2	
Goal #3	

TELL US ABOUT YOURSELF

1. What can you tell us about your family situation. For example, married with two children, second marriage or divorced.

2. What is important to you about financial independence? For example, you may value the flexibility to retire when you want or the ability to travel or visit family; what is most important to you?

PRESENT SOURCES OF INCOME - GROSS MONTHLY

Spouse A		Spouse B	
Source	Amount	Source	Amount

MONTHLY EXPENDITURES

Savings: What amounts do you average on a monthly basis?

Saving Plan	Monthly Amount
RRSP	
TFSA	
Open or Taxable	
Pension	
Emergency Fund	
Other	

CHILD EXPENSES

If applicable - What does it cost on average to raise your children?

Child Costs	Monthly Amount

INFORMATION LIST

Gather the following documents to ensure your financial plan is complete.

1. Provide a copy of your most recent Notice of Assessment and/or full income tax return.
2. Include your company pension statement(s)(*required*)
3. Include all current investment statements (*required*)
4. Provide insurance statements, including life, disability, critical illness and mortgage coverage.
5. Provide a copy of your current financial plan.

REAL ESTATE INVESTMENTS

Type	Owner	Value	Mortgage Balance	Monthly Payment	Interest Rate	Life Insurance
Principal Residence						
Recreational Residence						
Rental Property						
Rental Property						
Rental Property						

OTHER ASSETS

Type	Description	Owner	Value
Business			
Business			
Tangible Asset			
Tangible Asset			
Money Owed You			

OTHER DEBTS

Bellwether FAMILY WEALTH

Type	Description	Monthly Payment	Balance	Interest Rate	Term	Life Insurance
Line of Credit						
Investment Loan						
Loans On Insurance						
Credit Card						
Other						

EDUCATION FUNDING

Child's Name	Age	Annual Assistance – Amount and Number of Years	Type of Account (RESP, In Trust, Scholarship Plan)	Investment	Amount

ESTATE PLANNING

Item	Spouse A			Spouse B		
	Need	In Place	Needs Update	Need	In Place	Needs Update
Will						
Enduring Power of Attorney						
Personal Directive						
Asset List Updated						
Executor Notified						

Contact Us
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