100%

Getting Started - Financial Status Questionnaire - Wright, Shonda

Welcome to the Getting Started - Financial Status Questionnaire. Collecting your current financial status is critical in gaining the information provided to continue to build a plan just for you (and any others).

Assets and Accounts

Please indicate what assets and accounts you have currently today

✓ Please check all assets you have today:

- [x] Home
- [ ] Vacation / Cottage
- [ ] Investment Property
- [ ] Business (Private)
- [ ] International Property
- [ ] Cryptocurrency (ex. Bitcoin)
- [ ] Bonds (ex. Government / Corporate)
- [ ] Commodities (ex. Gold / Silver)
- [x] Collectibles (ex. Art / Vehicles)

✓ Please all of the accounts you have today:

- [x] Chequing / Savings Account
- [ ] Portfolios Annuities, Guaranteed Minimum Withdrawal Benefit Plans (GMWBs)
- [x] Tax-Free Savings Accounts (TFSAs)
- [x] Registered Retirement Savings Plans (RRSPs)
- [ ] Locked-In Retirement Accounts (LIRAs)
- [ ] Locked-In Retirement Savings Plans (LRSPs)
- [ ] Defined Contribution Pension Plans (DCPs, MPPs)
- [ ] Registered Retirement Income Funds (RRIFs)
- [ ] Life Income Funds (LIFs)
- [ ] Locked-In Retirement Income Funds (LRIFs)
- [ ] Defined Benefit Plans (DBPs)
- [ ] Non Registered / Open Account
- [ ] Trust
- [ ] Individual Pension Plan (IPP)
- [ ] Annuity(ies)
- [ ] Guaranteed Investment Certificate (GIC)
- [ ] Mutual Funds / Private Investment Pools
- [ ] Segregated Funds
- [ ] Structured Settlement

Liabilities

Please indicate what liabilities you have

✓ Please select all that apply

- [x] Mortgage
- [x] Line of Credit
- [ ] Term Loan
- [ ] Credit Card
- [ ] Home Equity Line of Credit
- [ ] Personal Loan (ex. Personal Loan with Interest from Family)
- [ ] Immediate Tax Debt
- [ ] Deferred Tax Debt
- [ ] Lease (ex. car lease)

Insurance

Please indicate what insurance policies you have

✓ Please select all that apply

- [x] Disability / Critical Illness / Similar Policies
- [ ] Life
- [x] Home and Auto
- [ ] Health Insurance
- [ ] Travel
- [ ] Long Term Care
- [ ] Other

Estate

✓ How prepared would you family be to receive inheritance? (1 - 10)

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Investing Profile

Please answer the below with an answer between 1 - 10.

1 = strongly disagree - 10 = strongly agree.

✓ I have a strong Wealth Planning Knowledge (1 - 10)?

2

✓ With my current Investments, the markets trending downwards concerns me significantly (1 - 10)

8

✓ I prefer not to be surprised by anything (1 - 10)

8

✓ I am comfortable taking risks with my money (1 - 10)

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