

Fact Finding / Needs Analysis

Date _____

With _____

Name		Spouse		Kids
Occupation		Occupation		
Income		Income		
Phone		Phone		
Email		Email		

Fixed Asset	Market Value	Mortgage	Payment	LOC	Payment	Rental Income	Notes
Residential							
Other Property							
Others							

	Applicant's Current Holding		Current Holding from Spouse	
	Account	Amount	Amount	Details
RRSP				
RESP				
TFSA				
Stock				
Mutual Fund				
Seg. Fund				
Life Insurance				
C.I / D.I.				
Cash/Saving				
Others				

Insurance Needs Analysis			
Cash Needs		Available Funds	
Debt (excluding mortgage)		Liquid Asset	
Income/ Expenses Replacement		Existing Insurance	
Mortgage		Others	
Education			
Income for survivor			
Others			
Total Cash Needs		Total Available Funds	

Recommendations/Notes