

# Needs Analysis

Date \_\_\_\_\_  
With \_\_\_\_\_

<b>Name</b>		<b>Spouse</b>		<b>Kids</b>
Occupation		Occupation		
Income		Income		
Phone		Email		

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

Account	Applicant's Current Holding		Current Holding from Spouse	
	Amount	Details	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			
<b>Total Cash Needs</b>		<b>Total Available Funds</b>	

<b>Recommendations/Notes</b>