

INTRODUCTORY FORM

Niagara Region Money Coaches. Take Control.

Financial Overview

In order to take full advantage of your time and provide you with the best information for your one-on-one money coaching sessions, please complete this form in full. This information will be kept strictly confidential.

Office Use Only

Personal Information

Name _____ Date of Birth _____
Place of Work _____ Type of Work _____
Annual Gross Income _____ Take-Home Pay _____ Every _____
Spouse's Name _____ Date of Birth _____
Place of Work _____ Type of Work _____
Annual Gross Income _____ Take-Home Pay _____ Every _____
Home Phone _____ Email 1 _____ Email 2 _____
Address _____
Street City Province Postal Code

Housing Information

How many dependants living at home? _____ Ages? _____
Do you Rent or Own your home? _____ Mortgage/Rent Payment? _____ / _____
Approx. Value of home? _____ Mortgage Balance? _____

Car Payments

Car 1 Amount _____ Frequency _____ Car 2 Amount _____ Frequency _____

Financial Information Summary

The total value of family's: RRSPs? _____ Pensions? _____
TFSA's? _____ RESP? _____
Other Investment Accounts/Cottage/Rentals/Land? _____



INTRODUCTORY FORM

Do you have a working monthly budget? _____ How do you track your expenses? _____

Did you have a tax refund last year? If so, how much? _____

How much are you saving for retirement per year (including employer contribution, Pensions, RRSPs)?

How much are you saving for Children's Education per year? _____

How much are you saving in other investments per year? _____

What is the approximate total of all other debt (student/personal loans, credit cards, lines of credit, etc.)?

Do you have any Life Insurance (type/amounts)? _____

Do you have updated Will(s)? _____

Your Financial Priorities

In order to best customize our agenda to meet your needs, please rank the areas you would like to focus on (#1 being the highest down to whatever you would like to cover):

<input type="text"/>	Developing a Cash Flow Plan (Budget)	<input type="text"/>	Forming Good Money Habits for Children
<input type="text"/>	Eliminating Personal Debt	<input type="text"/>	Understanding Low-Cost Investing
<input type="text"/>	Establishing an Emergency Fund	<input type="text"/>	Estate Planning
<input type="text"/>	Education Planning/Projections	<input type="text"/>	Investment Portfolio Review
<input type="text"/>	Educating Yourself on Financial Matters	<input type="text"/>	Building Net Worth/Retirement Planning
<input type="text"/>	Appropriate Insurance Coverage	<input type="text"/>	Real Estate (Buying/Selling)
<input type="text"/>	Other #1: Explain _____		
<input type="text"/>	Other #2: Explain _____		

Additional Comments _____
