

3. What do you "believe" is the gap between where you are and where you want to be financially?



4. What did you learn about money growing up?



5. Have you maximized your RRSP?

- Yes
- No
- I have not contributed into my RRSP yet

6. Have you maximized your TFSA?

- Yes
- No
- I have not contributed into my TFSA yet

7. Based on your tax situation, do you know which is better for you - an RRSP or TFSA?

- Yes
- No

8. In addition to RRSP and TFSA, what other strategies are you using to be tax efficient?



9. Do you donate money to reduce your tax payable?

Yes

No

10. What charitable causes most resonate with you?



11. Are you aware that your RRSPs and cash in your company will become part of your estate and taxed up to 53.50%?

Yes

No

12. Are you aware that insurance can help you save on taxes?

Yes

No

13. What other financial information can we provide you with?

