## Financial Health Assessment



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## Please complete this form to:

- 1. Gain clarity on your finances
- 2. Discover where you can improve on your finances



By filling out this form, you will be eligible for a 20-minute Complimentary Solutions Call from your advisor who will provide insight on your finances.

Name:			Phone:		
Profession:			Email:		
What is your	age range?	18-25	26-35	36-50	50+
How confide	nt are you with		1 2	3 4	5 Totally on top of it
1. Who	at are your top 2	2 Personal Financ	ial Goals?		
<b>&gt;&gt;&gt;</b>					
2. Wh	at are your top	2 Financial and T	'ax Challenges?		
<b>&gt;&gt;&gt;</b>					

## Financial Health Assessment



be financial	y?
4. What did	you learn about money growing up?
5. Have you	maximized your RRSP?
Yes	
No	
I have n	ot contributed into my RRSP yet
. Have you	maximized your TFSA?
Yes	
No	
I have n	ot contributed into my TFSA yet
'. Based on 'FSA?	your tax situation, do you know which is better for you - an RRSP
Yes	
No	

## Financial Health Assessment



9. Do you c	donate money to reduce your tax payable?
Yes	
No	
10. What c	haritable causes most resonate with you?
	u aware that your RRSPs and cash in your company will become part
	u aware that your RRSPs and cash in your company will become part e and taxed up to 53.50%?
your estate	
your estate Yes	
Yes No	
Yes No	e and taxed up to 53.50%?
Yes No  12. Are you	e and taxed up to 53.50%?
Yes No  12. Are you	e and taxed up to 53.50%?
Yes No  12. Are you Yes No	e and taxed up to 53.50%?  u aware that insurance can help you save on taxes?
Yes No  12. Are you Yes No	e and taxed up to 53.50%?