



TK
FINANCIAL
GROUP

TK Wealth Management Inc.

PLANNING QUESTIONNAIRE



Section 1: Personal Information

Client Name	<input type="text"/>	Spouse Name	<input type="text"/>
Date of Birth	<input type="text"/>	Date of Birth	<input type="text"/>
Address	<input type="text"/>	Telephone	<input type="text"/>

Section 2: Income / Investment Information

	Client	Spouse		Client	Spouse
Annual Income	<input type="text"/>	<input type="text"/>	RRSP Account Value	<input type="text"/>	<input type="text"/>
Income goal ¹ (At Retirement)	<input type="text"/>	<input type="text"/>	Yearly Contribution	<input type="text"/>	<input type="text"/>
Other Income	<input type="text"/>	<input type="text"/>	Non RRSP Account Value	<input type="text"/>	<input type="text"/>
			Yearly Contribution	<input type="text"/>	<input type="text"/>
			Locked In RRSP Amount	<input type="text"/>	<input type="text"/>

Section 3 Asset / Debt Information

	Client	Spouse		Client	Spouse
Cash	<input type="text"/>	<input type="text"/>	Credit Card Debt	<input type="text"/>	<input type="text"/>
Vehicle	<input type="text"/>	<input type="text"/>	Line of Credit	<input type="text"/>	<input type="text"/>
House	<input type="text"/>	<input type="text"/>	Mortgage	<input type="text"/>	<input type="text"/>
Other Assets	<input type="text"/>	<input type="text"/>	Other Debt	<input type="text"/>	<input type="text"/>

Section 4 Insurance / Pension Information

	Client	Spouse		Client	Spouse
Group Coverage Amount	<input type="text"/>	<input type="text"/>	Pension Expected	<input type="text"/>	<input type="text"/>
Individual Coverage Amount	<input type="text"/>	<input type="text"/>	Starting Age	<input type="text"/>	<input type="text"/>
Present Cash Value	<input type="text"/>	<input type="text"/>	Survivor Benefit% ²	<input type="text"/>	<input type="text"/>
Monthly Cost	<input type="text"/>	<input type="text"/>	What Type of Pension? ³		
			Defined Benefit		
			Defined Contribution		



FINANCIAL GROUP

Your Trust and Knowledge Team

Section 5: Dependants

Name of Dependant	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/>	<input type="text"/>	<input type="text"/>
RESP Contribution (Yearly)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Net Value	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you answered "YES" to a Dependant but do not have an RESP, Have you ever considered one?

Section 6: Additional Questions

- 1) When does your mortgage renew
- 2) At what age would you like to retire?
- 3) Do you have a current will?
- 4) Do you predict to receive a lump sum amount of income from an inheritance or sale of house (or other) that would impact your retirement?
If yes,
How much? \$
When?

Visit Us at www.thetkgroup.com



Definitions

¹The amount or percentage you would like to receive during retirement. A standard percentage is 75% of your current income.

²Your Spouse Is Protected When You Retire. When you retire, your pension must be offered in a "joint and survivor" form. This option entitles your surviving spouse to a lifetime pension of a certain per cent of the monthly pension paid to you.

³A Defined Benefit plan is a plan in which the benefit on retirement is determined by a set formula, rather than depending on investment returns. Many DB plans include early retirement provisions to encourage employees to retire early, before the attainment of normal retirement age.

In a Defined Contribution Plan, contributions are paid into an individual account for each member. The contributions are invested, and the returns on the investment are credited to the individual's account.