Client Profile

INDEPENDENT PLANNING GROUP INC.

CanWealth Financial Services

CLIENT INFORMATION REQUEST

Below is a list of information that you are required to bring to our initial appointment. Any personal information disclosed to CanWealth Financial is held in the strictest of confidence.

Client Name ______________________________ Phone ________________

REQUIRED INFORMATION

1.	Originals of any personal insurance policies (mortgage, life, car, home, disability)	Yes ☐	No ☐
2.	RRSP contribution limits (Your most recent Revenue Canada Assessment form)	Yes ☐	No ☐
3.	Employment retirement packages and group benefit plans	Yes ☐	No ☐
4.	Personal RRSP's (Individual Plans and Spousal RRSP Plans)	Yes ☐	No ☐
5.	Non-registered Assets (including GIC's investments, Bonds, Saving Account)	Yes ☐	No ☐
6.	Major Credit liabilities (Credit cards, loans, credit lines, etc.)	Yes ☐	No ☐
7.	Home and other property (purchase and present value)	Yes ☐	No ☐
8.	Outstanding Mortgage balances, current mortgage statement	Yes ☐	No ☐
9.	Business Assets you own	Yes ☐	No ☐
10.	Wills and Powers of Attorney	Yes ☐	No ☐