Financial Planning Questionnaire

Growth Space
Financial Solutions
Making Financial Stress Disappear

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Purpose of this Document / Confidentiality

The purpose of this document is to assist you in gathering all relevant personal and financial information required to provide you with financial planning and/or financial investment advice. The information you provide is strictly confidential and will be used exclusively for the preparation of your personal financial plan.

Table of Contents

Financial Planning Questionnaire _____ ***1***

Contact Information 1

Personal Information _____ **2**

Financial Goals _____ **4**

Expenses, Incomes, Pensions, and Government Benefits _____ **5**

Additional Expenses 5
Income 5
Pensions 5
Government Benefits 6

Net Worth _____ **7**

Assets 7
Liabilities 8

Insurance _____ **8**

Notes _____ **9**

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Personal Information

Clients

Name		
Date of Birth		
Address		
Employer		
Occupation		
Phone Number		
Email Address		
Citizenship(s)		

Children & RESP (Registered Education Savings Plans)

Name			
Date of Birth			
RESP Balance			
RESP Contributions and CESG Received to Date			
Annual Education Cost			
Education Start Age			
Education Length			

Financial Goals

Do you have any questions that we can help you answer?

(i.e., Do I have enough money to retire comfortably? How long will my money last? What is the most I can spend?)

What is your desired annual after-tax lifestyle expense in retirement?

(Note: this is the base expenses value)

When would you like to retire?

Is it important for you to pass any assets to the family as a legacy?

Do you have any financial goals? When do you want to reach these goals?

(i.e., Home renovation projects, paying off debt, paying off credit cards, travel, etc.)

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Expenses, Incomes, Pensions, and Government Benefits

Additional Expenses

(Example: vacation, cars, renovation, and other occasional or one-time expenses)

Client	Expense description	Annual Amount	From Age	To Age	Frequency (For example: every 3 years)	Indexation

Income

(Excluding investment income. Please enter CPP and OAS under the Government Benefits section.)

Client	Source	Annual Gross Amount	End Date	Indexation	Taxable (Yes/No)

Pensions

DBPP - Defined Benefit Pension Plan

Client	Source	Start Age	Amount Before Age 65			Amount at Age 65 and After		
			Gross Annual	Survivor %	Indexing %	Gross Annual	Survivor %	Indexing %

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DCPP - Defined Contribution Pension Plan

Client	Balance	Employee Contribution %	Employer Contribution %

Government Benefits

CPP - Canada Pension Plan

Client	Start Age	Gross Dollar Amount (Annual)	% of Maximum (Optional)

OAS - Old Age Security

Client	Start Age	Gross Dollar Amount (Annual)	40 years in Canada? / % of Maximum

Net Worth

Assets

Financial Assets

Registered

(Note on DCPPs: Please enter Defined Contribution Pension Plans under the Pensions section.)

Owner(s)	Account Type	Financial Institution	Market Value	Contribution Room	Annual Contributions (incl. Employer)
	TFSA				
	TFSA				
	RRSP / RRIF				
	RRSP / RRIF				
	Spousal RRSP				
	LIRA / LIF				
	FHSA			* Please see below	

* FHSA: Opening age:

Carryforward Room for this year:
Lifetime Contributions:

Non-Registered

Owner(s)	Account Type	Financial Institution	Market Value	Adjusted Cost Base	Annual Contributions (incl. Employer)
	Investment				
	Investment				
	Savings				

Real Assets

Owner(s)	Type	Location	Market Value	Adjusted Cost Base	Net Rental Income
	Principal Residence				
	Vacation Property				
	Rental Property				

Liabilities

Debts

Owner(s)	Type	Financial Institution	Balance	Interest Rate	Monthly Payment
	Mortgage				
	Loan				
	Line of Credit				

Insurance

Life Insurance

Owner(s)	Type	Life Insured	Beneficiaries	Coverage Details (Premiums, Benefit, End Date, Riders, Insurance Provider, Etc.)
	Term			
	Universal			
	Whole			

Notes

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