

Summary of your personal and financial situation

What is your annual income?

How old are you?

What is your marital status?

Do you have any dependants?

Your major financial assets

Home, cottage or other property

TFSA

RRSP

Non-registered investments

Business

Other

TOTAL major financial assets

Major debts

Car loan

Mortgage

Student loan

Other

TOTAL debts

Net worth

What percentage of your savings do your investments represent?

%