

Financial Information Summary Sheet

Client Name:

Date:

BANKING

	Firm	Account number
Bank accounts:		
Chequing		
Savings		
Other		
Credit Cards		
GICs		
Bank investment accounts		
Loans:		
Mortgage		
Investment line of credit		

Financial Information Summary Sheet *Cont'd*

INVESTMENTS

	Firm	Account number
Brokerage firm		
Pension Plans – list current & past		
RRSP		
TFSA		
Cash Accounts		

INSURANCE COVERAGE

	Carrier	Policy Number
Group Life		
Out of Country		
Group Disability		
Life Insurance		
Disability Insurance		
Long-term care		
Auto		
Home		

SOCIAL MEDIA

Provider	User ID	P/W Location

Financial Information Summary Sheet *Cont'd*

PROFESSIONAL ADVISORS

Accountant: _____

Real estate lawyer: _____

Investment Advisor: _____

Life Insurance Agent: _____

Estates and Trusts Lawyer: _____

Estate Executor and Power of Attorney: _____

Guardian of children: _____

UTILITIES

	Company	Paid from which bank account
Home Phone		
Cable / Internet		
Property Tax		
Gas		
Electricity		
Water		

MISCELLANEOUS

Business Bank accounts	
Web Sites	
Insurance Misc	
Business Misc	