

Section 7: Financial

2007 Product Questionnaire (85-1 to 85-4)



Banking and Financial Services

Main banking/others sometimes

brands: institutions

Services

- ATM/banking machine card
- children's package
- debit card for purchase
- electronic banking package
- flat fee package
- pre-authorized bill payment
- private banking
- seniors package
- small office/home office package
- student package

Telephone/Internet banking

personally used

used for: account queries, credit card application, insurance information, interest rate information, investment information, loan (application, information), mortgage (application, information), paying bills, purchasing insurance, purchasing investments, RSP contributions, transferring funds

brands: institutions

Loan/line of credit

types: home equity (line of credit, loan), personal line of credit, personal loan (auto, other), overdraft protection, student line of credit, student loan (government, bank), home improvement plan, investment loan, RRSP loan, small business loan

brands: institutions

Mortgages

types: principal residence, other real estate, reverse

brands: institutions

Credit cards

currently owned

amount spent

usually pay: minimum amount, partial payment, full amount, none

brands: card name, card issued by, monthly amount

Donations

Canadian charities

\$ amount

types: alumni, cultural, educational, environmental, hospital foundations, political, religious

organizations: Alzheimer Society, Arthritis Society, Big Brothers/Sisters, Cancer Society, Children's Wish, Diabetes Association, Easter Seals, Heart & Stroke, Kidney Foundation, Osteoporosis Society, Salvation Army, Sharelife, United Jewish Appeal, United Way

International relief/development

\$ amount

(continued)

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Income tax returns

filed past 12 months

method of filing: mailed return, e-file, netfile,
tefile

types: discounted return, regular

brands: who prepared return

Insurance

Life insurance

types: critical illness, long term care,
term, universal, whole life

kinds: group life, personal life

\$ value of personal life insurance

acquired through: agent/broker, bank/trust
company, credit card offer,
financial planner, insurance
company, Internet, place of
employment, professional/
alumni association, full
service/discount broker

brands: companies

Homeowners/personal property insurance

types: home, condo, personal property/
contents, vacation property

acquired through: agent/broker, bank/trust
company, insurance
company, professional/
alumni association,
place of employment

Private health insurance

kinds: dental insurance, disability

Mutual Funds

method: in person, by phone, Internet

types: within RRSP, outside RRSP

types: Balanced/Asset Allocation,
Canadian bond, Canadian equity,
Dividend, Energy, Environmental,
Guaranteed investment, Income,
Index, International bond,
International equity, Money
market, Mortgage, Precious
metals, Segregated funds, Science
& technology, Socially responsible,
Specialty equity, T-bill

brands: institutions

Non-RRSP Investments

institutions used:

bank, Caisse Populaire, credit
union, direct mutual fund company,
discount broker, finance company,
financial planner, full service broker,
life insurance company,
trust company

kinds: Canada Savings Bonds, collectibles,
common/preferred stock, company
pension, corporate bonds, ESOP,
GIC's, investment real estate,
precious metals, RESP, RRIF/
annuity, term deposits, treasury
bills, segregated funds, Quebec
Savings Bonds, other provincial
bonds

Stocks/bonds (# transactions)

Securities & savings (total value)

(continued)

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RRSP Investments

kinds: self-directed, other

institutions used:

bank, Caisse Populaire, credit union, direct mutual fund company, discount broker, finance company, financial planner, full service broker, life insurance company, trust company

investments: Canada Savings Bonds, other savings bonds, common or preferred stock, GIC's, labour funds, strip or coupon bonds, segregated funds, term deposits

when contributed: monthly, once-a-year
\$ contributed, average year

Wills/estate planning

Have will

kinds: including trust

prepared by: bank/trust company, lawyer, financial advisor, life insurance agent/broker, self

updated: over 2 years ago, past 2 years