

# FINANCIAL, INSURANCE, DONATIONS

BANKING & FINANCIAL SERVICES	PERSONALLY USE		TELEPHONE/ INTERNET BANKING	PERSONALLY USED		LOAN/ LINE OF CREDIT	PERSONALLY				
	For Main Banking	Others Sometimes		Past 3 Months	Telephone		Internet	Have	Obtained Past 2 Years		
<b>INSTITUTIONS:</b> Alberta Treasury Branches <input type="checkbox"/> <input type="checkbox"/> Amex Bank of Canada <input type="checkbox"/> <input type="checkbox"/> BMO Bank of Montreal <input type="checkbox"/> <input type="checkbox"/> CIBC <input type="checkbox"/> <input type="checkbox"/> Canadian Western Bank <input type="checkbox"/> <input type="checkbox"/> Citibank/Citigroup <input type="checkbox"/> <input type="checkbox"/> HSBC Bank Canada <input type="checkbox"/> <input type="checkbox"/> ICICI Bank <input type="checkbox"/> <input type="checkbox"/> ING Direct <input type="checkbox"/> <input type="checkbox"/> Investor's Group <input type="checkbox"/> <input type="checkbox"/> Laurentian Bank <input type="checkbox"/> <input type="checkbox"/>  Manulife Financial <input type="checkbox"/> <input type="checkbox"/> National Bank of Canada <input type="checkbox"/> <input type="checkbox"/> President's Choice Financial <input type="checkbox"/> <input type="checkbox"/> RBC Royal Bank <input type="checkbox"/> <input type="checkbox"/> Scotiabank <input type="checkbox"/> <input type="checkbox"/> TD Canada Trust <input type="checkbox"/> <input type="checkbox"/> <i>Other Bank</i> <input type="checkbox"/> <input type="checkbox"/>  Capital City Savings <input type="checkbox"/> <input type="checkbox"/> VanCity Credit Union <input type="checkbox"/> <input type="checkbox"/> <i>Other Credit Union</i> <input type="checkbox"/> <input type="checkbox"/>  Caisse Populaire <input type="checkbox"/> <input type="checkbox"/> Desjardins <input type="checkbox"/> <input type="checkbox"/>  Cheque Cashing Service <input type="checkbox"/> <input type="checkbox"/> Finance Company <input type="checkbox"/> <input type="checkbox"/> Insurance Company <input type="checkbox"/> <input type="checkbox"/> Trust Company <input type="checkbox"/> <input type="checkbox"/> Bank Or Financial Service In The U.S. <input type="checkbox"/> <input type="checkbox"/> <i>Other</i> <input type="checkbox"/> <input type="checkbox"/>			YES <input type="checkbox"/> NO <input type="checkbox"/>  <div style="background-color: black; color: white; text-align: center; padding: 2px;"><b>TELEPHONE/ INTERNET BANKING</b></div> <div style="text-align: center; font-weight: bold;">PERSONALLY USED PAST 3 MONTHS</div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"></td> <td style="width: 25%; text-align: center;">Telephone</td> <td style="width: 25%; text-align: center;">Internet</td> </tr> </table> <b>USED FOR:</b> Account Queries <input type="checkbox"/> <input type="checkbox"/> Credit Card Application <input type="checkbox"/> <input type="checkbox"/> Insurance Information <input type="checkbox"/> <input type="checkbox"/> Interest Rates Information <input type="checkbox"/> <input type="checkbox"/> Investment Information <input type="checkbox"/> <input type="checkbox"/> Loan Information <input type="checkbox"/> <input type="checkbox"/> Loan/Line of Credit Application <input type="checkbox"/> <input type="checkbox"/> Mortgage Application <input type="checkbox"/> <input type="checkbox"/> Mortgage Information <input type="checkbox"/> <input type="checkbox"/> Paying Bills <input type="checkbox"/> <input type="checkbox"/> Purchasing Insurance <input type="checkbox"/> <input type="checkbox"/> Purchasing Investments <input type="checkbox"/> <input type="checkbox"/> RSP Contribution <input type="checkbox"/> <input type="checkbox"/> Transferring Funds <input type="checkbox"/> <input type="checkbox"/> <i>Other</i> <input type="checkbox"/> <input type="checkbox"/>  <b>INSTITUTIONS:</b> BMO Bank of Montreal <input type="checkbox"/> <input type="checkbox"/> CIBC <input type="checkbox"/> <input type="checkbox"/> HSBC Bank Canada <input type="checkbox"/> <input type="checkbox"/> ING Direct <input type="checkbox"/> <input type="checkbox"/> President's Choice Financial <input type="checkbox"/> <input type="checkbox"/> RBC Investments <input type="checkbox"/> <input type="checkbox"/> RBC Royal Bank <input type="checkbox"/> <input type="checkbox"/> Scotiabank <input type="checkbox"/> <input type="checkbox"/> TD Canada Trust <input type="checkbox"/> <input type="checkbox"/> <i>Other Bank</i> <input type="checkbox"/> <input type="checkbox"/>  VanCity Credit Union <input type="checkbox"/> <input type="checkbox"/> <i>Other Credit Union</i> <input type="checkbox"/> <input type="checkbox"/>  Caisse Populaire <input type="checkbox"/> <input type="checkbox"/>  Trust Company <input type="checkbox"/> <input type="checkbox"/>		Telephone	Internet			<b>INSTITUTIONS:</b> Amex Bank of Canada <input type="checkbox"/> <input type="checkbox"/> BMO Bank of Montreal <input type="checkbox"/> <input type="checkbox"/> CIBC <input type="checkbox"/> <input type="checkbox"/> HSBC Bank Canada <input type="checkbox"/> <input type="checkbox"/> ING Direct <input type="checkbox"/> <input type="checkbox"/> Laurentian Bank <input type="checkbox"/> <input type="checkbox"/> National Bank of Canada <input type="checkbox"/> <input type="checkbox"/> President's Choice Financial <input type="checkbox"/> <input type="checkbox"/> RBC Royal Bank <input type="checkbox"/> <input type="checkbox"/> Scotiabank <input type="checkbox"/> <input type="checkbox"/> TD Canada Trust <input type="checkbox"/> <input type="checkbox"/> <i>Other Bank</i> <input type="checkbox"/> <input type="checkbox"/> VanCity Credit Union <input type="checkbox"/> <input type="checkbox"/> <i>Other Credit Union</i> <input type="checkbox"/> <input type="checkbox"/> Caisse Populaire <input type="checkbox"/> <input type="checkbox"/> Finance Company <input type="checkbox"/> <input type="checkbox"/> <i>Other</i> <input type="checkbox"/> <input type="checkbox"/>		
	Telephone	Internet									
<b>BANKING &amp; FINANCIAL SERVICES</b>	PERSONALLY		<b>LOAN/ LINE OF CREDIT</b>	PERSONALLY		<b>MORTGAGES</b>	PERSONALLY				
	Have	Used Past 3 Months		Have	Obtained Past 2 Years		Have	Obtained Past 2 Years			
<b>TYPES:</b> Senior's Package <input type="checkbox"/> <input type="checkbox"/> Student Package <input type="checkbox"/> <input type="checkbox"/> Children's Package <input type="checkbox"/> <input type="checkbox"/> Pre-Authorized Bill Payment <input type="checkbox"/> <input type="checkbox"/> ATM/Debit Card <input type="checkbox"/> <input type="checkbox"/> Flat Fee Package <input type="checkbox"/> <input type="checkbox"/> Private Banking <input type="checkbox"/> <input type="checkbox"/> Electronic Banking Package <input type="checkbox"/> <input type="checkbox"/> Small Office/Home Office Package <input type="checkbox"/> <input type="checkbox"/> Financial Planning/Advice <input type="checkbox"/> <input type="checkbox"/>			YES <input type="checkbox"/> NO <input type="checkbox"/>  <b>TYPES:</b> Home Equity Line Of Credit <input type="checkbox"/> <input type="checkbox"/> Home Equity Loan <input type="checkbox"/> <input type="checkbox"/> Personal Line Of Credit <input type="checkbox"/> <input type="checkbox"/> Personal Loan —Auto <input type="checkbox"/> <input type="checkbox"/> —Other <input type="checkbox"/> <input type="checkbox"/> Overdraft Protection <input type="checkbox"/> <input type="checkbox"/> Student —Government Loan <input type="checkbox"/> <input type="checkbox"/> —Bank Loan <input type="checkbox"/> <input type="checkbox"/> —Line Of Credit <input type="checkbox"/> <input type="checkbox"/> Home Improvement Plan <input type="checkbox"/> <input type="checkbox"/> Investment Loan <input type="checkbox"/> <input type="checkbox"/> RRSP Loan <input type="checkbox"/> <input type="checkbox"/> Small Business Loan <input type="checkbox"/> <input type="checkbox"/>			YES <input type="checkbox"/> NO <input type="checkbox"/>  <b>TYPES:</b> Principal Residence <input type="checkbox"/> <input type="checkbox"/> Reverse <input type="checkbox"/> <input type="checkbox"/> <i>Other Real Estate</i> <input type="checkbox"/> <input type="checkbox"/>  <b>INSTITUTIONS:</b> BMO Bank of Montreal <input type="checkbox"/> <input type="checkbox"/> CIBC <input type="checkbox"/> <input type="checkbox"/> HSBC Bank Canada <input type="checkbox"/> <input type="checkbox"/> ING <input type="checkbox"/> <input type="checkbox"/> National Bank of Canada <input type="checkbox"/> <input type="checkbox"/> President's Choice Financial <input type="checkbox"/> <input type="checkbox"/> RBC Royal Bank <input type="checkbox"/> <input type="checkbox"/> Scotiabank <input type="checkbox"/> <input type="checkbox"/> TD Canada Trust <input type="checkbox"/> <input type="checkbox"/> <i>Other Bank</i> <input type="checkbox"/> <input type="checkbox"/> VanCity Credit Union <input type="checkbox"/> <input type="checkbox"/> <i>Other Credit Union</i> <input type="checkbox"/> <input type="checkbox"/> Caisse Populaire <input type="checkbox"/> <input type="checkbox"/> Mortgage Broker <input type="checkbox"/> <input type="checkbox"/> Trust Company <input type="checkbox"/> <input type="checkbox"/> <i>Other</i> <input type="checkbox"/> <input type="checkbox"/>					



# FINANCIAL, INSURANCE, DONATIONS

TOTAL SECURITIES & SAVINGS	PERSONALLY HOLD	CREDIT CARDS	IN OWN NAME		CREDIT CARDS	IN OWN NAME		
	Total Value		Currently Have	Acquired Past 12 Months		Currently Have	Acquired Past 12 Months	
WILLS/ESTATE PLANNING	PERSONALLY HAVE	<b>CARDS (Continued):</b> MasterCard —Affinity <input type="checkbox"/> <input type="checkbox"/> —Air Miles (Regular Or Gold) <input type="checkbox"/> <input type="checkbox"/> —Canadian Tire Options <input type="checkbox"/> <input type="checkbox"/> —Chase/Sears <input type="checkbox"/> <input type="checkbox"/> —Citi Petro Points <input type="checkbox"/> <input type="checkbox"/> —Classic/Regular <input type="checkbox"/> <input type="checkbox"/> —Corporate <input type="checkbox"/> <input type="checkbox"/> —Drivers Edge <input type="checkbox"/> <input type="checkbox"/> —Mosaik <input type="checkbox"/> <input type="checkbox"/> —Mosaik with Air Miles (regular or WestJet) <input type="checkbox"/> <input type="checkbox"/> —Other Gold/Premier <input type="checkbox"/> <input type="checkbox"/> —Platinum <input type="checkbox"/> <input type="checkbox"/> —President's Choice <input type="checkbox"/> <input type="checkbox"/>  VISA —Aero Classic <input type="checkbox"/> <input type="checkbox"/> —Aerogold <input type="checkbox"/> <input type="checkbox"/> —Affinity <input type="checkbox"/> <input type="checkbox"/> —Aventura <input type="checkbox"/> <input type="checkbox"/> —Avion Platinum <input type="checkbox"/> <input type="checkbox"/> —British Airways Platinum <input type="checkbox"/> <input type="checkbox"/> —Cathay Pacific Platinum <input type="checkbox"/> <input type="checkbox"/> —Classic/Regular <input type="checkbox"/> <input type="checkbox"/> —Corporate <input type="checkbox"/> <input type="checkbox"/> —Dividend <input type="checkbox"/> <input type="checkbox"/> —Elite Visa <input type="checkbox"/> <input type="checkbox"/> —Emerald <input type="checkbox"/> <input type="checkbox"/> —Esso <input type="checkbox"/> <input type="checkbox"/> —GM <input type="checkbox"/> <input type="checkbox"/> —Gold/Elite/Gold Travel <input type="checkbox"/> <input type="checkbox"/> —Gold Preferred <input type="checkbox"/> <input type="checkbox"/> —Gold Select <input type="checkbox"/> <input type="checkbox"/> —Gold Travel Select <input type="checkbox"/> <input type="checkbox"/> —Green <input type="checkbox"/> <input type="checkbox"/> —HBC <input type="checkbox"/> <input type="checkbox"/> —Moneyback <input type="checkbox"/> <input type="checkbox"/> —Platinum <input type="checkbox"/> <input type="checkbox"/> —Platinum Preferred <input type="checkbox"/> <input type="checkbox"/> —Premier/Gold/Prestige <input type="checkbox"/> <input type="checkbox"/> —Select Visa <input type="checkbox"/> <input type="checkbox"/> —Shoppers Optimum <input type="checkbox"/> <input type="checkbox"/> —Starbucks Duetto <input type="checkbox"/> <input type="checkbox"/> —Value Visa <input type="checkbox"/> <input type="checkbox"/> —Wal-Mart <input type="checkbox"/> <input type="checkbox"/>  Student Card <input type="checkbox"/> <input type="checkbox"/> U.S. Dollar <input type="checkbox"/> <input type="checkbox"/>  Department Store Cards —Canadian Tire <input type="checkbox"/> <input type="checkbox"/> —Costco <input type="checkbox"/> <input type="checkbox"/> —HBC <input type="checkbox"/> <input type="checkbox"/> —Sam's Club <input type="checkbox"/> <input type="checkbox"/> —Sears <input type="checkbox"/> <input type="checkbox"/> —The Bay <input type="checkbox"/> <input type="checkbox"/> —Wal-Mart <input type="checkbox"/> <input type="checkbox"/> —Zellers <input type="checkbox"/> <input type="checkbox"/> —Other <input type="checkbox"/> <input type="checkbox"/>  Gasoline Card <input type="checkbox"/> <input type="checkbox"/> Internet Credit Card <input type="checkbox"/> <input type="checkbox"/> Other Credit Card <input type="checkbox"/> <input type="checkbox"/>		Total Value	IN OWN NAME		IN OWN NAME	
CREDIT CARDS	Will			Currently Have	Acquired Past 12 Months	Currently Have	Acquired Past 12 Months	
CREDIT CARDS	IN OWN NAME	<b>ISSUED BY:</b> MasterCard —BMO Bank of Montreal <input type="checkbox"/> <input type="checkbox"/> —Capital One <input type="checkbox"/> <input type="checkbox"/> —Chase/Sears <input type="checkbox"/> <input type="checkbox"/> —Citibank <input type="checkbox"/> <input type="checkbox"/> —Credit Union <input type="checkbox"/> <input type="checkbox"/> —HSBC Bank Canada <input type="checkbox"/> <input type="checkbox"/> —MBNA <input type="checkbox"/> <input type="checkbox"/> —National Bank <input type="checkbox"/> <input type="checkbox"/> —National Trust <input type="checkbox"/> <input type="checkbox"/>  Canadian Tire <input type="checkbox"/> <input type="checkbox"/> President's Choice <input type="checkbox"/> <input type="checkbox"/>  VISA —Caisse Populaire/Desjardins <input type="checkbox"/> <input type="checkbox"/> —CIBC <input type="checkbox"/> <input type="checkbox"/> —Citizen's Bank <input type="checkbox"/> <input type="checkbox"/> —Home Trust <input type="checkbox"/> <input type="checkbox"/> —Laurentian <input type="checkbox"/> <input type="checkbox"/> —RBC Royal Bank <input type="checkbox"/> <input type="checkbox"/> —Scotiabank <input type="checkbox"/> <input type="checkbox"/> —TD Canada Trust <input type="checkbox"/> <input type="checkbox"/> —Vancouver City Savings <input type="checkbox"/> <input type="checkbox"/>		Currently Have	Acquired Past 12 Months	Currently Have	Acquired Past 12 Months	
CREDIT CARDS	IN OWN NAME			IN OWN NAME		IN OWN NAME		
CREDIT CARDS	IN OWN NAME	<b>PREPARED BY:</b> Bank/Trust Company <input type="checkbox"/> Lawyer <input type="checkbox"/> Financial Advisor <input type="checkbox"/> Life Insurance Agent/Broker <input type="checkbox"/> Self <input type="checkbox"/> Other <input type="checkbox"/>  <b>UPDATED:</b> In Past 2 Years <input type="checkbox"/> Over 2 Years Ago <input type="checkbox"/>		AVERAGE AMOUNT SPENT		AVERAGE AMOUNT SPENT EACH MONTH		
CREDIT CARDS	IN OWN NAME			AVERAGE AMOUNT SPENT EACH MONTH		AVERAGE AMOUNT SPENT EACH MONTH		
CREDIT CARDS	IN OWN NAME	<b>CARDS:</b> American Express —Aeroplan <input type="checkbox"/> <input type="checkbox"/> —Aeroplan Plus <input type="checkbox"/> <input type="checkbox"/> —Aeroplan Plus Gold <input type="checkbox"/> <input type="checkbox"/> —Aeroplan Plus Platinum <input type="checkbox"/> <input type="checkbox"/> —Air Miles (Regular Or Gold) <input type="checkbox"/> <input type="checkbox"/> —Costco <input type="checkbox"/> <input type="checkbox"/> —Credit Card <input type="checkbox"/> <input type="checkbox"/> —Green <input type="checkbox"/> <input type="checkbox"/> —Blue <input type="checkbox"/> <input type="checkbox"/> —Gold <input type="checkbox"/> <input type="checkbox"/> —Platinum <input type="checkbox"/> <input type="checkbox"/> —Corporate <input type="checkbox"/> <input type="checkbox"/> —Other <input type="checkbox"/> <input type="checkbox"/>  Diners Club (With MasterCard Acceptance) —Corporate (Company) <input type="checkbox"/> <input type="checkbox"/> —Professional (Personal) <input type="checkbox"/> <input type="checkbox"/>		AVERAGE AMOUNT SPENT EACH MONTH		OUTSTANDING BALANCE		
CREDIT CARDS	IN OWN NAME			AVERAGE AMOUNT SPENT EACH MONTH		OUTSTANDING BALANCE		
CREDIT CARDS	IN OWN NAME	<b>USUALLY PAY:</b> Minimum Payment <input type="checkbox"/> Partial Payment <input type="checkbox"/> Full Amount <input type="checkbox"/> None <input type="checkbox"/>		AVERAGE AMOUNT SPENT EACH MONTH		OUTSTANDING BALANCE		
CREDIT CARDS	IN OWN NAME			AVERAGE AMOUNT SPENT EACH MONTH		OUTSTANDING BALANCE		

# FINANCIAL, INSURANCE, DONATIONS

INCOME TAX RETURNS	PERSONALLY FILED	LIFE INSURANCE	PERSONALLY		DONATIONS — Canadian —	PERSONALLY DONATED
	Past 12 Months		Carry	Acquired Past 2 Years		Past 12 Months
<p>YES ..... <input type="checkbox"/></p> <p>NO ..... <input type="checkbox"/></p> <p><b>WHO PREPARED RETURN:</b></p> <p>Personally Prepared</p> <p>—With Pen &amp; Paper ..... <input type="checkbox"/></p> <p>—With Computer Software ..... <input type="checkbox"/></p> <p>—Online ..... <input type="checkbox"/></p> <p>Friend or Relative ..... <input type="checkbox"/></p> <p>Bookkeeper/Accountant ..... <input type="checkbox"/></p> <p>H&amp;R Block ..... <input type="checkbox"/></p> <p>Liberty Tax ..... <input type="checkbox"/></p> <p>Softron ..... <input type="checkbox"/></p> <p>CCRA/Revenue Canada</p> <p>  Volunteer Program ..... <input type="checkbox"/></p> <p>  Other Paid Tax Preparer ..... <input type="checkbox"/></p> <p><b>TYPES:</b></p> <p>Debit Card ..... <input type="checkbox"/></p> <p>Direct Deposit (Electronically) ..... <input type="checkbox"/></p> <p>Discounted Return (Immediate</p> <p>  Cash, Cash Back) ..... <input type="checkbox"/></p> <p>Regular (Check Sent by</p> <p>  CCRA/Revenue Canada) ..... <input type="checkbox"/></p> <p><b>METHOD OF FILING:</b></p> <p>Mailed Return ..... <input type="checkbox"/></p> <p>Efile (By Efile Service Provider) ..... <input type="checkbox"/></p> <p>Netfile (By Computer/Internet) ..... <input type="checkbox"/></p> <p>Telephone (By Telephone) ..... <input type="checkbox"/></p>		<p><b>COMPANIES:</b></p> <p>AIG Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>BMO Bank Of Montreal ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Canada Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>CIBC Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Clarica Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Empire Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Great West Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Imperial Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Industrial Alliance/   L'Industrielle-Alliance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Laurentian-Desjardins ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>London Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Manulife Financial ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Maritime Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>National Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>NN Financial ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>RBC Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Royal Sun Alliance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Standard Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Sun Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>TD Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>The Co-Operators ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Transamerica ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Other ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>			<p>YES ..... <input type="checkbox"/></p> <p>NO ..... <input type="checkbox"/></p> <p><b>AMOUNT:</b></p> <p>Under \$50 ..... <input type="checkbox"/></p> <p>\$51-\$100 ..... <input type="checkbox"/></p> <p>\$101-\$200 ..... <input type="checkbox"/></p> <p>\$201-\$500 ..... <input type="checkbox"/></p> <p>\$501+ ..... <input type="checkbox"/></p> <p><b>TYPES:</b></p> <p>Alumni ..... <input type="checkbox"/></p> <p>Cultural ..... <input type="checkbox"/></p> <p>Educational ..... <input type="checkbox"/></p> <p>Environmental ..... <input type="checkbox"/></p> <p>Hospital Foundations ..... <input type="checkbox"/></p> <p>Political ..... <input type="checkbox"/></p> <p>Religious ..... <input type="checkbox"/></p> <p><b>ORGANIZATIONS:</b></p> <p>Alzheimer Society ..... <input type="checkbox"/></p> <p>Arthritis Society ..... <input type="checkbox"/></p> <p>Big Brothers/Sisters ..... <input type="checkbox"/></p> <p>Cancer Society ..... <input type="checkbox"/></p> <p>Children's Wish Foundation ..... <input type="checkbox"/></p> <p>Diabetes Association ..... <input type="checkbox"/></p> <p>Easter Seals ..... <input type="checkbox"/></p> <p>Heart &amp; Stroke Foundation ..... <input type="checkbox"/></p> <p>Kidney Foundation ..... <input type="checkbox"/></p> <p>Osteoporosis Society ..... <input type="checkbox"/></p> <p>Salvation Army ..... <input type="checkbox"/></p> <p>ShareLife ..... <input type="checkbox"/></p> <p>United Jewish Appeal ..... <input type="checkbox"/></p> <p>United Way of Canada ..... <input type="checkbox"/></p>	
LIFE INSURANCE	PERSONALLY	HOMEOWNERS OR PERSONAL PROPERTY INSURANCE	PERSONALLY	PERSONALLY	DONATIONS — International Relief/ Development —	PERSONALLY DONATED
	Carry		Carry	Carry		Past 12 Months
<p>YES ..... <input type="checkbox"/></p> <p>NO ..... <input type="checkbox"/></p> <p><b>KIND:</b></p> <p>Group Life Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Personal Life Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p><b>TYPES:</b></p> <p>Whole Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Universal Life ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Term Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Critical Illness ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Long Term Care ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p><b>FACE VALUE (PERSONAL LIFE INSURANCE):</b></p> <p>Less Than \$20,000 ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>\$20,000-\$49,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>\$50,000-\$99,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>\$100,000-\$249,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>\$250,000-\$499,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>\$500,000+ ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p><b>ACQUIRED THROUGH:</b></p> <p>Agent/Broker ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Bank/Trust Company ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Financial Planner ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Insurance Company ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Professional/Alumni   Association ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Credit Card Offer ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Place Of Employment ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Full Service/Discount   Broker ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Other ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>	Carry	<p>YES ..... <input type="checkbox"/></p> <p>NO ..... <input type="checkbox"/></p> <p><b>TYPES:</b></p> <p>Home ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Condo ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Personal Property/Contents ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Vacation Property ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p><b>ACQUIRED THROUGH:</b></p> <p>Agent/Broker ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Bank/Trust Company ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Insurance Company ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Professional/Alumni   Association ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Place Of Employment ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>	Carry	Past 2 Years	<p>YES ..... <input type="checkbox"/></p> <p>NO ..... <input type="checkbox"/></p> <p><b>AMOUNT:</b></p> <p>Under \$50 ..... <input type="checkbox"/></p> <p>\$51-\$100 ..... <input type="checkbox"/></p> <p>\$101-\$200 ..... <input type="checkbox"/></p> <p>\$201-\$500 ..... <input type="checkbox"/></p> <p>\$501+ ..... <input type="checkbox"/></p>	Past 12 Months
		PRIVATE HEALTH INSURANCE		PERSONALLY BOUGHT		
				Past 12 Months		
		<p>YES ..... <input type="checkbox"/></p> <p>NO ..... <input type="checkbox"/></p> <p><b>KINDS:</b></p> <p>Dental Insurance ..... <input type="checkbox"/></p> <p>Disability ..... <input type="checkbox"/></p> <p>Other ..... <input type="checkbox"/></p>				