





# 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
<p>None ..... <input type="checkbox"/></p> <p>Under \$10,000 ..... <input type="checkbox"/></p> <p>\$10,001-\$25,000 ..... <input type="checkbox"/></p> <p>\$25,001-\$50,000 ..... <input type="checkbox"/></p> <p>\$50,001-\$100,000 ..... <input type="checkbox"/></p> <p>\$100,001-\$250,000 ..... <input type="checkbox"/></p> <p>\$250,001-\$500,000 ..... <input type="checkbox"/></p> <p>\$500,000-1 Million ..... <input type="checkbox"/></p> <p>1 Million+ ..... <input type="checkbox"/></p>		<p><b>CARDS (Continued):</b></p> <p>MasterCard</p> <p>—Affinity ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Air Miles (Regular Or Gold) ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Canadian Tire Options ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Chase/Sears ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Citi Petro Points ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Classic/Regular ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Corporate ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Drivers Edge ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Mosaik ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Mosaik with Air Miles (regular or WestJet) ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Other Gold/Premier ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Platinum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—President's Choice ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>VISA</p> <p>—Aero Classic ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Aerogold ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Affinity ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Aventura ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Avion Platinum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—British Airways Platinum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Cathay Pacific Platinum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Classic/Regular ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Corporate ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Dividend ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Elite Visa ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Emerald ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Esso ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—GM ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Gold/Elite/Gold Travel ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Gold Preferred ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Gold Select ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Gold Travel Select ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Green ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—HBC ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Infinite Avion ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Moneyback ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Platinum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Platinum Preferred ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Premier/Gold/Prestige ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Select Visa ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Shoppers Optimum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Starbucks Duetto ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Value Visa ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Wal-Mart ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>	<p><b>ISSUED BY:</b></p> <p>MasterCard</p> <p>—BMO Bank of Montreal ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Capital One ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Chase/Sears ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Citibank ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Credit Union ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—HSBC Bank Canada ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—MBNA ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—National Bank ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Canadian Tire ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>President's Choice ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>VISA</p> <p>—Caisse Populaire/Desjardins ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—CIBC ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Citizen's Bank ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Laurentian ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—RBC Royal Bank ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Scotiabank ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—TD Canada Trust ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Vancouver City Savings ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>				
WILLS/ESTATE PLANNING	PERSONALLY HAVE						
	Will						
<p>YES ..... <input type="checkbox"/></p> <p>NO ..... <input type="checkbox"/></p> <p><b>KIND:</b></p> <p>Includes Trust ..... <input type="checkbox"/></p> <p><b>PREPARED BY:</b></p> <p>Bank/Trust Company ..... <input type="checkbox"/></p> <p>Lawyer ..... <input type="checkbox"/></p> <p>Financial Advisor ..... <input type="checkbox"/></p> <p>Life Insurance Agent/Broker ..... <input type="checkbox"/></p> <p>Self ..... <input type="checkbox"/></p> <p>Other ..... <input type="checkbox"/></p> <p><b>UPDATED:</b></p> <p>In Past 2 Years ..... <input type="checkbox"/></p> <p>Over 2 Years Ago ..... <input type="checkbox"/></p>							
CREDIT CARDS	IN OWN NAME		Currently Have				
<p>NONE ..... <input type="checkbox"/></p> <p>1 ..... <input type="checkbox"/></p> <p>2 ..... <input type="checkbox"/></p> <p>3-4 ..... <input type="checkbox"/></p> <p>5-6 ..... <input type="checkbox"/></p> <p>7+ ..... <input type="checkbox"/></p>							
CREDIT CARDS	IN OWN NAME		Currently Have	Acquired Past 12 Months			
<p><b>CARDS:</b></p> <p>American Express</p> <p>—Aeroplan ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Aeroplan Plus ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Aeroplan Plus Gold ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Aeroplan Plus Platinum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Air Miles (Regular Or Gold) ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Costco ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Credit Card ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Green ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Blue ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Gold ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Platinum ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Corporate ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Other ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Diners Club (With MasterCard Acceptance)</p> <p>—Corporate (Company) ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Professional (Personal) ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>		<p>Student Card ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>U.S. Dollar ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Department Store Cards</p> <p>—Canadian Tire ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Costco ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—HBC ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Sam's Club ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Sears ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—The Bay ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Wal-Mart ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Zellers ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>—Other ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Gasoline Card ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Internet Credit Card ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Other Credit Card ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>					
					AVERAGE AMOUNT SPENT		
					Each Month		
					<p>\$1-\$100 ..... <input type="checkbox"/></p> <p>\$101-\$500 ..... <input type="checkbox"/></p> <p>\$501-\$1,000 ..... <input type="checkbox"/></p> <p>\$1,001-\$1,500 ..... <input type="checkbox"/></p> <p>Over \$1,500 ..... <input type="checkbox"/></p>		
					AVERAGE AMOUNT SPENT EACH MONTH		
					\$1- 100    \$101- 500    \$501- 1000    Over 1000		
					<p>American Express ..... <input type="checkbox"/> ..... <input type="checkbox"/> ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>MasterCard ..... <input type="checkbox"/> ..... <input type="checkbox"/> ..... <input type="checkbox"/> ..... <input type="checkbox"/></p> <p>Visa ..... <input type="checkbox"/> ..... <input type="checkbox"/> ..... <input type="checkbox"/> ..... <input type="checkbox"/></p>		
					OUTSTANDING BALANCE		
					Each Month		
					<p><b>USUALLY PAY:</b></p> <p>Minimum Payment ..... <input type="checkbox"/></p> <p>Partial Payment ..... <input type="checkbox"/></p> <p>Full Amount ..... <input type="checkbox"/></p> <p>None ..... <input type="checkbox"/></p>		

# 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	
YES ..... <input type="checkbox"/> NO ..... <input type="checkbox"/>  <b>WHO PREPARED RETURN:</b> Personally Prepared —With Pen & Paper ..... <input type="checkbox"/> —With Computer Software ..... <input type="checkbox"/> —Online ..... <input type="checkbox"/> Friend or Relative ..... <input type="checkbox"/> Bookkeeper/Accountant ..... <input type="checkbox"/> H&R Block ..... <input type="checkbox"/> Liberty Tax ..... <input type="checkbox"/> CCRA/Revenue Canada Volunteer Program ..... <input type="checkbox"/> Other Paid Tax Preparer ..... <input type="checkbox"/>  <b>TYPES:</b> Debit Card ..... <input type="checkbox"/> Direct Deposit (Electronically) ..... <input type="checkbox"/> Discounted Return (Immediate Cash, Cash Back) ..... <input type="checkbox"/> Regular (Cheque Sent by CCRA/Revenue Canada) ..... <input type="checkbox"/>  <b>METHOD OF FILING:</b> Mailed Return ..... <input type="checkbox"/> Efile (By Efile Service Provider) ..... <input type="checkbox"/> Netfile (By Computer/Internet) ..... <input type="checkbox"/> Telefile (By Telephone) ..... <input type="checkbox"/>			<b>COMPANIES:</b> AIG Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> BMO Bank Of Montreal ..... <input type="checkbox"/> ..... <input type="checkbox"/> Canada Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> CIBC Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/> Clarica Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Empire Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Great West Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Imperial Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Industrial Alliance/ L'Industrielle-Alliance ..... <input type="checkbox"/> ..... <input type="checkbox"/> Laurentian-Desjardins ..... <input type="checkbox"/> ..... <input type="checkbox"/> London Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Manulife Financial ..... <input type="checkbox"/> ..... <input type="checkbox"/> Maritime Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> National Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> RBC Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/> Royal Sun Alliance ..... <input type="checkbox"/> ..... <input type="checkbox"/> Standard Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Sun Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> TD Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/> The Co-Operators ..... <input type="checkbox"/> ..... <input type="checkbox"/> Transamerica ..... <input type="checkbox"/> ..... <input type="checkbox"/> Other ..... <input type="checkbox"/> ..... <input type="checkbox"/>			YES ..... <input type="checkbox"/> NO ..... <input type="checkbox"/>  <b>AMOUNT:</b> Under \$50 ..... <input type="checkbox"/> \$51-\$100 ..... <input type="checkbox"/> \$101-\$200 ..... <input type="checkbox"/> \$201-\$500 ..... <input type="checkbox"/> \$501-\$1,000 ..... <input type="checkbox"/> \$1,001-\$5,000 ..... <input type="checkbox"/> \$5,001+ ..... <input type="checkbox"/>  <b>TYPES:</b> Alumni ..... <input type="checkbox"/> Cultural ..... <input type="checkbox"/> Educational ..... <input type="checkbox"/> Environmental ..... <input type="checkbox"/> Hospital Foundations ..... <input type="checkbox"/> Political ..... <input type="checkbox"/> Religious ..... <input type="checkbox"/>  <b>ORGANIZATIONS:</b> Alzheimer Society ..... <input type="checkbox"/> Arthritis Society ..... <input type="checkbox"/> Big Brothers/Sisters ..... <input type="checkbox"/> Cancer Society ..... <input type="checkbox"/> Children's Wish Foundation ..... <input type="checkbox"/> Diabetes Association ..... <input type="checkbox"/> Easter Seals ..... <input type="checkbox"/> Heart & Stroke Foundation ..... <input type="checkbox"/> Kidney Foundation ..... <input type="checkbox"/> Osteoporosis Society ..... <input type="checkbox"/> Salvation Army ..... <input type="checkbox"/> ShareLife ..... <input type="checkbox"/> United Jewish Appeal ..... <input type="checkbox"/> United Way of Canada ..... <input type="checkbox"/>		
LIFE INSURANCE	PERSONALLY		HOMEOWNERS OR PERSONAL PROPERTY INSURANCE	PERSONALLY		DONATIONS — International Relief/ Development —	PERSONALLY DONATED	
	Carry	Acquired Past 2 Years		Carry	Acquired Past 2 Years		Past 12 Months	
YES ..... <input type="checkbox"/> NO ..... <input type="checkbox"/>  <b>KIND:</b> Group Life Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/> Personal Life Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/>  <b>TYPES:</b> Whole Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Universal Life ..... <input type="checkbox"/> ..... <input type="checkbox"/> Term Insurance ..... <input type="checkbox"/> ..... <input type="checkbox"/> Critical Illness ..... <input type="checkbox"/> ..... <input type="checkbox"/> Long Term Care ..... <input type="checkbox"/> ..... <input type="checkbox"/>  <b>FACE VALUE (PERSONAL LIFE INSURANCE):</b> Less Than \$20,000 ..... <input type="checkbox"/> ..... <input type="checkbox"/> \$20,000-\$49,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/> \$50,000-\$99,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/> \$100,000-\$249,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/> \$250,000-\$499,999 ..... <input type="checkbox"/> ..... <input type="checkbox"/> \$500,000+ ..... <input type="checkbox"/> ..... <input type="checkbox"/>  <b>ACQUIRED THROUGH:</b> Agent/Broker ..... <input type="checkbox"/> ..... <input type="checkbox"/> Bank/Trust Company ..... <input type="checkbox"/> ..... <input type="checkbox"/> Financial Planner ..... <input type="checkbox"/> ..... <input type="checkbox"/> Insurance Company ..... <input type="checkbox"/> ..... <input type="checkbox"/> Professional/Alumni Association ..... <input type="checkbox"/> ..... <input type="checkbox"/> Credit Card Offer ..... <input type="checkbox"/> ..... <input type="checkbox"/> Place Of Employment ..... <input type="checkbox"/> ..... <input type="checkbox"/> Full Service/Discount Broker ..... <input type="checkbox"/> ..... <input type="checkbox"/> Other ..... <input type="checkbox"/> ..... <input type="checkbox"/>			YES ..... <input type="checkbox"/> NO ..... <input type="checkbox"/>  <b>TYPES:</b> Home ..... <input type="checkbox"/> ..... <input type="checkbox"/> Condo ..... <input type="checkbox"/> ..... <input type="checkbox"/> Personal Property/Contents ..... <input type="checkbox"/> ..... <input type="checkbox"/> Vacation Property ..... <input type="checkbox"/> ..... <input type="checkbox"/>  <b>ACQUIRED THROUGH:</b> Agent/Broker ..... <input type="checkbox"/> ..... <input type="checkbox"/> Bank/Trust Company ..... <input type="checkbox"/> ..... <input type="checkbox"/> Insurance Company ..... <input type="checkbox"/> ..... <input type="checkbox"/> Professional/Alumni Association ..... <input type="checkbox"/> ..... <input type="checkbox"/>			YES ..... <input type="checkbox"/> NO ..... <input type="checkbox"/>  <b>AMOUNT:</b> Under \$50 ..... <input type="checkbox"/> \$51-\$100 ..... <input type="checkbox"/> \$101-\$200 ..... <input type="checkbox"/> \$201-\$500 ..... <input type="checkbox"/> \$501-\$1,000 ..... <input type="checkbox"/> \$1,001-\$5,000 ..... <input type="checkbox"/> \$5,001+ ..... <input type="checkbox"/>		
			PRIVATE HEALTH INSURANCE	PERSONALLY BOUGHT				
				Past 12 Months				
			YES ..... <input type="checkbox"/> NO ..... <input type="checkbox"/>  <b>KINDS:</b> Dental Insurance ..... <input type="checkbox"/> Disability ..... <input type="checkbox"/> Other ..... <input type="checkbox"/>					