

FINANCIAL PROFILE

NAME

DATE

Please answer the following questions - Yes; No; Unsure or Does Not Apply

1. I have accurately projected my retirement income needs and sources of income
2. Stability in the value of my investments is critical
3. I am comfortable in taking higher risk to achieve long term growth
4. I am satisfied with the current rate of return on my investments
5. My spouse/partner actively participates in our financial affairs
6. I am satisfied that my investments and pensions will provide adequate income for life
7. My current standard of living will continue if I have a severe accident or illness
8. My life insurance program will enable my family to maintain their present lifestyle
9. My will is current and consistent with my wishes
10. I understand how taxes will be applied to my estate
11. Preserving my estate is very important