

Net Worth Application

Prepared By: _____

Date: _____

1 Client Information

Client _____ Spouse/Partner _____
DOB _____ DOB _____

2 Personal Use Property

	Client	Spouse/Partner	Joint
Household Furnishings	\$ _____	\$ _____	\$ _____
Automobiles	\$ _____	\$ _____	\$ _____
Art and Jewelry	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____

3 Savings and Investment

	Client	Spouse/Partner	Joint
RRSP/RRIF	\$ _____	\$ _____	
Locked-In Plans	\$ _____	\$ _____	
TFSA	\$ _____	\$ _____	
Non-Registered Investments	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____

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4 Real Estate

Client	Spouse/Partner	Joint
Principal Residence \$ _____	\$ _____	\$ _____
Recreational Property \$ _____	\$ _____	\$ _____
Investment Property \$ _____	\$ _____	\$ _____
Other \$ _____	\$ _____	\$ _____

5 Unsecured Debts

Client	Spouse/Partner	Joint
Credit Cards \$ _____	\$ _____	\$ _____
Line of Credit \$ _____	\$ _____	\$ _____
Car Loan \$ _____	\$ _____	\$ _____
Other \$ _____	\$ _____	\$ _____

6 Secured Debts

Client	Spouse/Partner	Joint
Principal Residence \$ _____	\$ _____	\$ _____
Recreational Property \$ _____	\$ _____	\$ _____
Investment Property \$ _____	\$ _____	\$ _____
Other \$ _____	\$ _____	\$ _____

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7 Corporate Assets

	Client	Spouse/Partner	Joint
Investments and Securities	\$ _____	\$ _____	\$ _____
Real Estate	\$ _____	\$ _____	\$ _____
Operations and Goodwill	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____

8 Corporate Liabilities

	Client	Spouse/Partner	Joint
Mortgages	\$ _____	\$ _____	
Other	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____