

Net Worth

Complete the fillable PDF and save.



CLIENT NAMES		
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RETIREMENT ASSETS	INVESTMENT ASSETS
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RRSPs (individual & group)		Chequing, savings accounts	
TFSAs		GICs, Term deposits, CSBs	
RRIFs, LIFs		Mutual funds	
Locked in RRSPs/LIRAs		Stocks, bonds	
Value of your pension plan		Real estate (investment)	
Other <input style="width: 100%;" type="text"/>		Cash value of life insurance	
Other <input style="width: 100%;" type="text"/>		Other <input style="width: 100%;" type="text"/>	
Other <input style="width: 100%;" type="text"/>		Other <input style="width: 100%;" type="text"/>	

PERSONAL ASSETS	LIABILITIES
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Personal residence		Mortgage - personal residence	
Vacation property		Mortgage - other properties	
Vehicles		Personal loans	
Furnishings		Credit cards	
Jewelry		Line of credit	
Art, collectables		Investment loans	
Other <input style="width: 100%;" type="text"/>		Other <input style="width: 100%;" type="text"/>	
Other <input style="width: 100%;" type="text"/>		Other <input style="width: 100%;" type="text"/>	

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