

HER info

- **Income**
 - Salary _____
 - Investment _____
 - Rental _____
 - Pension _____

- **Assets**
 - Home _____
 - Rental property _____
 - Vacation property _____

- **Investments**
 - RRSP's _____
 - _____
 - _____

 - Regular investments _____
 - _____
 - _____

- **Monthly expenses** _____
(please see monthly budget planner)

- **Future pensions** _____
(or please bring statements)

- **Insurance policies** _____
(or please bring statements)

'Helping women achieve financial independence'



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