



GREEN PRIVATE WEALTH

Preparing for Financial Freedom



Simply follow this **4 STEP PROCESS** to better equip our advisory team in enabling your finances to work harder for you, making planning for retirement a less stressful experience.

STEP 1 of 4

	YOU	PARTNER
PERSONAL INFORMATION	Name	
	Date of Birth	
	Address	
	Phone #	
	Email	
	Occupation/Employer	
	Retirement Age	
	Children/DOB	

STEP 2 of 4

Understanding your cash flow - the money you make, minus expenses/debt payments and savings:

	YOU	PARTNER
INCOME/EXPENSES/SAVINGS	Income Before Tax	
	Approx. Yearly Expenses	
	Debt - Yearly Mortgage	
	Debt - Other	
	Savings - RRSP	
	Savings - TFSA	
	Savings - Company Pension	
	Savings - Other	





STEP 3 of 4

What you own and what you owe:

ASSETS & LIABILITIES		YOU	PARTNER
	Value of House		
	Other Real Estate		
	Mortgage Balance		
	Other Loan Balances		
	Pension Value		
	RRSP Value		
	Investments - TFSA		
	Investments - Other		

STEP 4 of 4

For your first initial meeting, please be sure to bring in the following latest statement/paperwork as well as this worksheet completed to the best of your ability:

FIRST MEETING CHECKLIST		YOU	PARTNER
	Latest Tax Return	<input type="checkbox"/>	<input type="checkbox"/>
	Current Notice of Assessment	<input type="checkbox"/>	<input type="checkbox"/>
	Current Pension Statement	<input type="checkbox"/>	<input type="checkbox"/>
	Current Company Benefits Booklet	<input type="checkbox"/>	<input type="checkbox"/>
	Current Investment Statements (RRSP, TFSA, Non-registered, etc)	<input type="checkbox"/>	<input type="checkbox"/>
	Life Insurance, Disability Policy or Statements	<input type="checkbox"/>	<input type="checkbox"/>
	Wills & Powers of Attorney	<input type="checkbox"/>	<input type="checkbox"/>

Should you have difficulty filling in any of the questions provided on this worksheet, our advisors will be happy to assist you. During your initial meeting, Green Private Wealth will discuss the most essential requirement – your goals – in great detail. In order for your advisory team to help with your financial direction, you will need to provide our team with your long-term and short-term goal objectives. Setting, writing and monitoring measurable goals is a very important exercise, that enables you to evolve to higher levels of wealth throughout your lifetime.

