



**ASSETS, CASH**

List ALL Assets	Customer	Partner
Savings Accounts	\$	\$
All Investments	\$	\$
RRSPs	\$	\$
Home/Property	\$	\$
Other		
Total Assets	\$	\$

**LIABILITIES**

List ALL Debts (estimated balances)	Customer	Partner
Bank Loan	\$	\$
Line of credit	\$	\$
Credit cards	\$	\$
Mortgage	\$	\$
Car loan(s)	\$	\$
Other - specify	\$	\$
Total Debts	\$	\$

**MONTHLY INCOME**

List ALL Income	Customer	Partner
Employment	\$	\$
Self Employment		
AISH	\$	\$
SFI	\$	\$
Medical	\$	\$
Senior's Income	\$	\$
Pension Plan	\$	\$
Child Tax Benefit	\$	\$
Child Support	\$	\$
Spousal Support	\$	\$
Student Loans	\$	\$
Other - specify		
Total Income	\$	\$

