CU Financial Planning

Annual Client Review

Meeting Update

(Private and Confidential)

CU Financial Planning is committed to keeping your financial planning goals and information current. In order for us to better respond to your personal situation, we would appreciate you completing the following information.

Date: ____________________________________

Name: ____________________________________

Address: ____

____

Email address: ____

Are there any changes to your and/or your spouse's/partner's plans for retirement? If yes, please specify:

____

____

Have there been any changes to current income?

____

____

Have there been any changes to debt or assets?

____

____

Cash Reserves and Debt

- Outstanding mortgage balances? $ ________________
- Other debt balances? $ ________________
- How much money do you have in your Cash reserves? $ ________________

What are your biggest financial concerns?

I. ________________________________
II. ________________________________
III. ________________________________

Are there any additional services that we could provide you with?

I. ________________________________
II. ________________________________
III. ________________________________

Are there any specific issues you would like to address at your upcoming review?

I. ________________________________
II. ________________________________
III. ________________________________

	Y	N
In the event of your death or disability, are you sure that the family's needs would be met?	☐	☐
Would you like to discuss this?	☐	☐

Do you require a review or referral for the following:

	Y	N
Accounting	☐	☐
Insurances	☐	☐
Mortgage broker	☐	☐
Solicitor (will, POA)	☐	☐

The greatest compliment our clients can give us is to refer a friend or family member. We want you to know that we always appreciate referrals and make a priority of responding to them.

Name: ________________________________

Contact details: ________________________________

____

Client signature: ________________________________

Client Signature: ________________________________