

## GETTING GOOD ADVICE

Working with your advisor to save for retirement

# Financial snapshot

To help build a realistic retirement savings plan, your advisor will need an accurate assessment of your current finances. Use the following list to develop a current inventory of your income sources, expenses, assets and liabilities. Revisit this list when you conduct the annual review of your retirement plan or any time your circumstances change.

Income sources (per month)	Expenses (per month)	Assets
Employment \$	Rent/mortgage \$	Employment-based pension plan \$
Investment income \$	Property taxes \$	RRSPs \$
Child care/spousal support \$	Utilities \$	Savings \$
Trust \$	Insurance \$	Stocks \$
Other (specify details) \$	Loan/lease payments \$	Bonds \$
<b>Liabilities</b>	Credit cards \$	Mutual funds \$
Mortgage(s) \$	Child care/spousal support \$	Other securities \$
Line(s) of credit \$	Parental care \$	Life insurance (cash value) \$
Personal loan(s) \$	Food \$	Real estate \$
RRSP loan(s) \$	Transportation \$	Other (specify details) \$
Business loan(s) \$	Entertainment \$	
Credit card balances \$	Charitable giving \$	
Other (specify details) \$	Other (specify details) \$	