

Financial Planning Fact Finder

| Monthly Net Income | Net Income |
|--------------------|------------|
| Employment | |
| Employment | |
| Other Income | |
| Total | |



IDEAL VISION
WEALTH MANAGEMENT



Monthly Expenses

| Housing | Cost |
|----------------------|------|
| Mortgage or Rent | |
| Property Tax | |
| Cell Phone | |
| Home Phone | |
| Internet/Cable | |
| Cable | |
| Hydro | |
| Water | |
| Property Maintenance | |
| Total | |

| Transportation | Cost |
|-------------------|------|
| Car Payment/lease | |
| Car Payment/lease | |
| Insurance | |
| Fuel | |
| Maintenance | |
| Total | |

| Insurance | Cost |
|------------------|------|
| Home | |
| Life | |
| Critical Illness | |
| Disability | |
| Total | |

| Food | Cost |
|------------|------|
| Groceries | |
| Dining Out | |
| Total | |

| Pets | Cost |
|----------|------|
| Food | |
| Medical | |
| Grooming | |
| Total | |

| Personal Care | Cost |
|--------------------------------|------|
| Medical (Chiro/Massage/Prescr) | |
| Hair/Nails | |
| Clothing | |
| Health Club Membership | |
| Vision | |
| Total | |

| Lifestyle | Cost |
|---------------|------|
| Entertainment | |
| Vacation | |
| Recreation | |
| Other | |
| Total | |

| Loans/Bank | Cost |
|--------------------------|------|
| Overdraft/Line of Credit | |
| Credit Cards | |
| Total | |

| Asset Accumulation | Cost |
|--------------------|------|
| Emergency Fund | |
| RESP | |
| RRSP/TFSA | |
| Total | |

| Children | Cost |
|----------------------------|------|
| Activities | |
| Gifts (Birthday/Christmas) | |
| Allowance | |
| Tuition (Out of Pocket) | |
| Total | |

| Support | Cost |
|-----------------|------|
| Spousal Support | |
| Child Support | |
| Total | |

| | |
|--------------------------|--|
| Total Monthly Net Income | |
| Total Monthly Expenses | |