

David Chen, B.Sc., B.A., CSA (Certified Senior Advisor)

(Associated with Sun Life Financial)

10470 – 152nd St., Suite 170, Surrey, BC, V3R-0Y3

ph: 604-889-7782, email: info@dccompletefinancial.com

M-Th 10am–10pm, Fri 10am-4pm, Vancouver, Surrey offices & mobile services serving the lower mainland



Confidential

Your Bucket List



1. What are your top 3 intentions you want to complete before the end of your life?

a.

b.

c.

2. What are your intentions:

a. In the next 3 years:

b. 4-10 years from now:

c. Over 10 years from now:

3. What 3 things do you want for your disabled child and other children?

a.

b.

c.

4. What have you done until now to accomplish these intentions?

5. At what age do you want to retire?

6. If you could have just one of the above dreams come true, which would it be?

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How do you feel about your:	Good shape	Ok	Needs attention	Not applicable	Notes
RRSP's maximum contribution every year					
6 months minimum expenses emergency cash					
Non-RRSP savings					
Bucket list completed					
Plans on how to reach retirement					
Plans on how to insure my retirement money lasts my whole life					
Life insurance					
Disability benefit plan					
Critical Illness benefit plan					
Long Term Care Benefits plan					
Estate succession tax reduction plans					
Educational savings for my children					
Plans on how to own my own home					
Current last will and testament					
I have plans and money for special education for my disabled child					
Plan to leave money for my disabled child					
Current discretionary trust agreement					
Trustee selected					
Plans to use RDSP in the future					
I have a housing plan for my disabled child					

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To make our time together as efficient as possible, please complete as much of this summary as possible. Do not get emotional as this is a snap shot tool to help us see you successes to date.

Mr/Ms _____ (First) (Middle) (Last) Birth date _____ d m yr Nicotine product/marijuana use Yes / No Occupation _____ Employer _____ Annual Income \$ _____ / year Telephone Bus. () _____ - _____ Cell () _____ - _____ Home () _____ - _____ e-mail: _____	Mr/Ms _____ (First) (Middle) (Last) Birth date _____ d m yr Nicotine product/marijuana use Yes / No Occupation _____ Employer _____ Annual Income \$ _____ / year Telephone Bus. () _____ - _____ Cell () _____ - _____ Home () _____ - _____ e-mail: _____
Address _____ Langley / Richmond / Surrey / Vancouver / Other _____ Postal Code _____ - _____	
Children _____ (Name) Male / Female: Birth day _____ (d / m / yr) _____ (Name) Male / Female: Birth day _____ (d / m / yr) _____ (Name) Male / Female: Birth day _____ (d / m / yr) _____ (Name) Male / Female: Birth day _____ (d / m / yr)	

Home

Owner : Him / Her / Other _____ **Mortgage Co.** _____ **Mortgage Rate** _____ %
Total Value \$ _____ **Total Mortgage** \$ _____ **Renewal Date** _____ 20____
Rent / Mortgage \$ _____ Bimonthly/ Monthly

Insurance In Force

Critical Illness _____ Disability _____ Long Term Care _____ Group Coverage _____ Group Life _____ Group STD / LTD _____ Other _____	Critical Illness _____ Disability _____ Long Term Care _____ Group Coverage _____ Group Life _____ Group STD / LTD _____ Other _____
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Mortgage Ins.: Company _____ **Coverage Type :** Critical Illness / Disability / Life
Coverage \$ _____ **Cost** \$ _____ / month / bi weekly **Policy#** _____

Investments – (Totals)

Liquid Cash _____ Miscellaneous _____ Mutual Funds _____ RRSP _____ Business _____ Stocks _____ Debt _____ Debt _____ Net Worth * _____ (Assets – Debts)	Liquid Cash _____ Miscellaneous _____ Mutual Funds _____ RRSP _____ Business _____ Stocks _____ Debt _____ Debt _____ Net Worth * _____ (Assets – Debts)
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Investment Knowledge: Excellent / Good / Fair / Nil Time to Invest: < 5yrs, 5-10 yrs, 10-20 yrs, > 20 yrs Risk Tolerance: High / Medium / Low Objectives: Cash / Income / Income & Growth Growth / Aggressive Growth	
Last Will & Testament: None / In Place Enduring Power of Attorney: None / In Place	Last Will & Testament: None / In Place Enduring Power of Attorney: None / In Place

Are you planning to buy a home soon? Yes / No	When?: Real-estate agent name: _____ Phone #: _____ Address: _____ Mortgage Co.: _____ Phone #: _____ Address: _____
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Before our first meeting, please have as many of the following items prepared as possible (as current as possible and note that some items may not even apply):

- RRSP statements**
- tax assessment**
- savings and cash account statements**
- non-RRSP investment account statements**
- stock account statements**
- debt statements (credit cards, lines of credits, loans including car student and personal loans)**
- group benefit statements from work**
- insurance, disability, critical illness and long term care policy statements**
- statements of any other significant asset or debt not mentioned.**