

### NET WORTH PROFILE

Full Name: \_\_\_\_\_  
Spouse's/Partner's Name: (if applicable) \_\_\_\_\_  
Home Address: \_\_\_\_\_  
City: \_\_\_\_\_ Prov: \_\_\_\_\_  
Postal Code: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Business Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
What is the best time to call? \_\_\_\_\_ May we call you at work? \_\_\_\_\_

### PERSONAL FACTORS

Date of Birth \_\_\_\_\_ Marital Status \_\_\_\_\_  
Number of Children \_\_\_\_\_  
Please list businesses you have owned & operated or currently own & operate:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### FINANCIAL DATA ASSETS

Cash/Chequing/Savings	
RRSP's	
Residence (Market Value)	
Autos, Trucks (Market Value)	
Liquid Stocks and Bonds	
Other	
Other Real Estate (Market Value)	
Other Assets	
<b>TOTAL ASSETS</b>	

### LIABILITIES

Owed on Real Estate/Residence	
Owed on Other Real Estate	
Car Loans/Notes Payable	
Average Credit Card Balance	
Other Amounts Owing	
<b>TOTAL LIABILITIES</b>	

<b>NET WORTH</b> (Assets less Liabilities)	
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*Note: All information will be kept strictly confidential. Gus and Guido's reserves the right to request further substantiation on the information provided.*