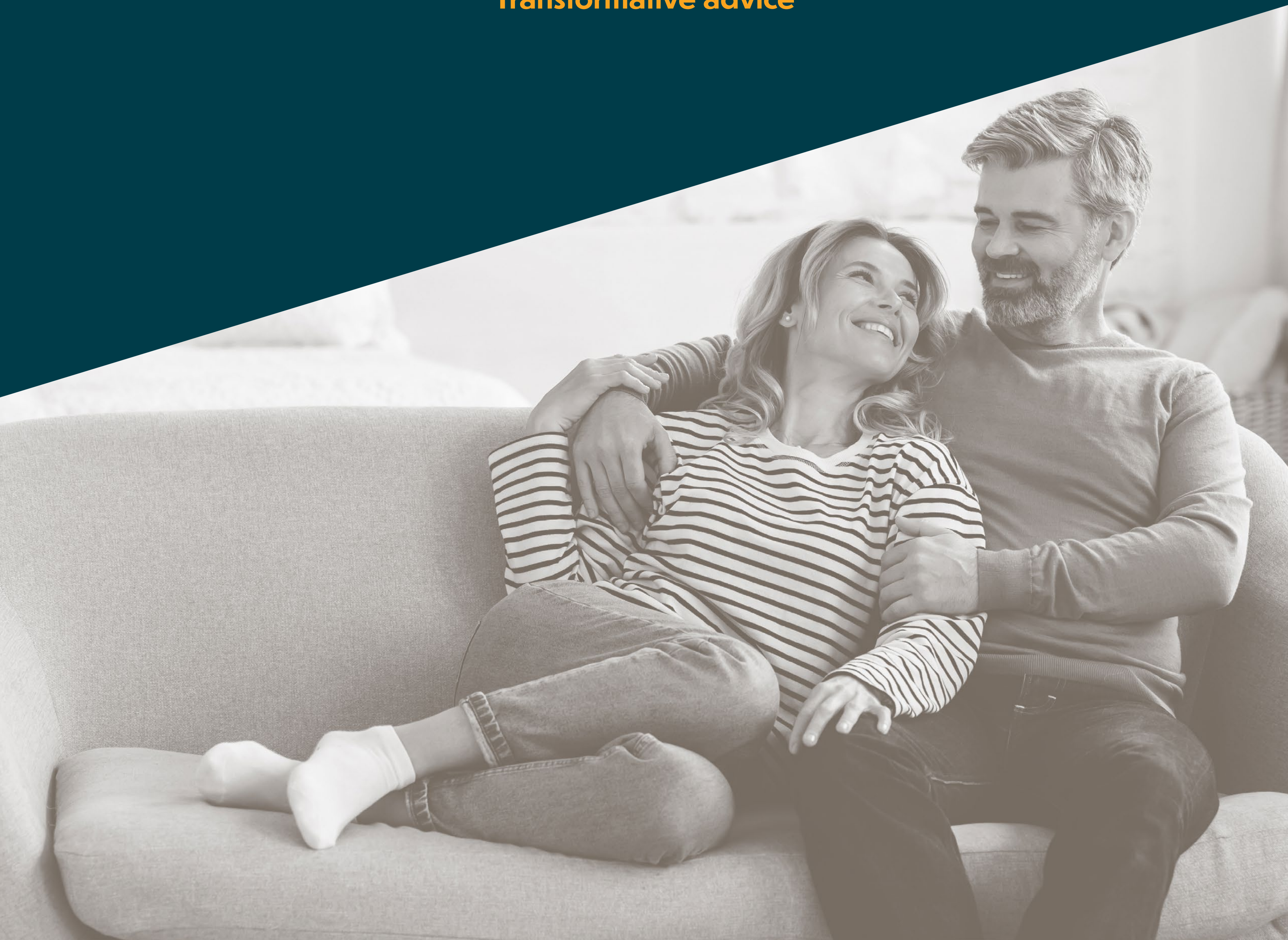
Getting to Know You

monarch
FINANCIAL

Transformative advice



Tell us about yourself

Please complete this brief questionnaire so our advisors are prepared for your initial consultation. Once you're done, save the completed .pdf and email it to monarch.financial@sunlife.com. All information is strictly confidential.

You and your family

Name: ______ Age: ______

Email: ______ Phone: ______

Address: ______

City: ______ Postal Code: ______

Occupation: ______ Employer: ______

Job Title: ______ Annual Income: ______

Spouse/Partner: ______ Age: ______

Occupation: ______ Employer: ______

Job Title: ______ Annual Income: ______

Dependent children: ______ Age: ______

______ Age: ______

______ Age: ______

Your relationship with us

Do you have a written financial plan? Yes ☐ No ☐ Last updated: ______

Why did you reach out? ______

Have you previously worked with a financial planner and/or investment advisor? Yes ☐ No ☐

What did and didn't you like about this relationship?

What factors do you feel are essential to a successful advisory relationship?

Tell us about your priorities

Please select all topics that apply and rate their importance	Very Important	Important	Not Important
Financial Planning & Wealth Management			
Creating a comprehensive financial plan			
Retirement planning			
Investment portfolio analysis			
Tax minimization strategies			
Saving for children's education			
Saving for a home			
Estate Planning			
Preserving & transferring your wealth to the next generation			
Creating a legacy			
Risk Management			
Providing financial security for your family (life insurance)			
Protecting your income (disability / critical illness insurance)			
Business Owners			
Insurance to fund buy-sell agreement or for key person			
Group benefits/savings for your employees			
Other Needs			
Debt reduction & cash flow management			
Planning involving recreational / investment properties			
Caring for a dependent family member			

Tell us about your current financial picture

	You	Spouse / partner
Which types of investment accounts do you currently have?	RRSP ☐ TFSA ☐ OPEN ☐ RESP ☐	RRSP ☐ TFSA ☐ OPEN ☐ RESP ☐
Do you participate in a company pension or matching group savings plan?	Yes ☐ No ☐	Yes ☐ No ☐
Do you own your home?	Yes ☐ No ☐	Yes ☐ No ☐
Do you have a will and Powers of Attorney?	Yes ☐ No ☐	Yes ☐ No ☐
What is your household investment portfolio?	$0 - 100K ☐ $100 - 250K ☐ $250 - 500K ☐	$500K - 1M ☐ $1 - 2.5M ☐ $2.5M+ ☐
What is your household debt (including mortgage)?	$0 - 100K ☐ $100 - 250K ☐ $250 - 500K ☐	$500K - 1M ☐ $1 - 2.5M ☐ $2.5M+ ☐

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