

FINANCIAL STRATEGIES FROM **KURT ROSENTRETER**

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FINANCIAL PLANNING DATA COLLECTOR

Provided By Kurt Rosentreter, CA, CFP

RETIREMENT

In order to complete a retirement forecast to show how much money you need to save until retirement, please provide the following information by saving it to this document and returning it to us.

Estimated value of your Home: \$ _____

Value of the mortgage on your home: \$ _____

Renewal date of the mortgage on your home: \$ _____

Value of your other residences, rental properties, land and other real estate: \$ _____

Value of your other mortgages on this land and buildings: \$ _____

Renewal date of the mortgage on this land and building: \$ _____

Value of RRSP Accounts that are not with Kurt: (you) \$ _____

Value of Tax Free Accounts that are not with Kurt: \$ _____

Value of RRSP Accounts that are not with Kurt: (partner) \$ _____

Value of Tax Free Accounts that are not with Kurt: \$ _____

Value of investment accounts, bank accounts, other savings not with Kurt: \$ _____

Value of company pension plans (and expected retirement pension): \$ _____

Value of public company stock, stock options, RSUs and profit sharing: \$ _____

Line of Credit Balance: \$ _____

Value of any private business interests today: \$ _____

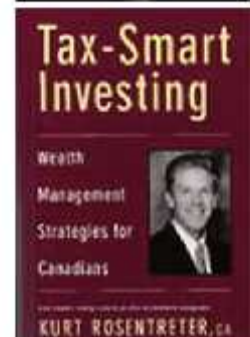
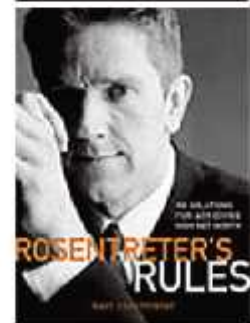
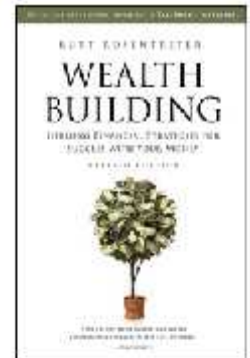
Plans for this business in retirement: \$ _____

Expected annual cash flow from this business if you keep it in retirement: \$ _____

Desired age of retirement: \$ _____

Desired Annual Budget for spending in retirement: \$ _____

Kurt's National Best Selling Books



Your total annual income today: \$ _____

Your spouse's annual income today: \$ _____

If you have children, will they be totally independent financially by the time you retire?

Other facts about your retirement plans:

Provide names and dates of birth of all children you have _____

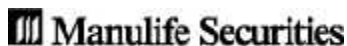
Do you envision having to financially support family members during your retirement?

Once you return this data to Kurt, we will compute the status of your retirement plan as you progress towards retirement in the future. Please email this completed file to Kurt at Kurt.Rosentreter@manulifesecurities.ca.

The Wealth Management Practice of Kurt Rosentreter
Kurt Rosentreter, CA, CFP, CLU, TEP, FMA, CIMA, FCSI, CIM
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Certified Financial Planner, Manulife Securities Insurance Inc.

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