

Name: \_\_\_\_\_

Date: \_\_\_\_\_

# Gap Analysis

**2017**

**20\_\_**

**20\_\_**

## Lifestyle

\_\_\_\_\_

## Lifestyle

\_\_\_\_\_

## Lifestyle

\_\_\_\_\_

## Budget

\_\_\_\_\_

## (A) Budget \$

\_\_\_\_\_

## (A) Budget \$

\_\_\_\_\_

## Income Sources

\$ \_\_\_\_\_  
(Gross Monthly Salary/Income)

## (B) Income Sources

• \_\_\_\_\_

## (B) Income Sources

• \_\_\_\_\_

\$ \_\_\_\_\_  
(Spouse's Gross Monthly Salary/Income)

• \_\_\_\_\_

• \_\_\_\_\_

## Savings

Cash: \$ \_\_\_\_\_  
(T-Bills, GICs & Term Deposits)

TFSA: \$ \_\_\_\_\_

=====

=====

## Investments

### Real Estate

Principal Residence: \$ \_\_\_\_\_

Principal Mortgage: \$ \_\_\_\_\_

LOC - Limit \$ \_\_\_\_\_

LOC - Utilized \$ \_\_\_\_\_

Rental Property Value: \$ \_\_\_\_\_

Rental Property Mortgages: \$ \_\_\_\_\_

## A - B = GAP / SURPLUS

$$\underline{\quad\quad\quad} \text{ A } - \underline{\quad\quad\quad} \text{ B } = \underline{\quad\quad\quad} \text{ \$ } \text{ GAP}$$

## A - B = GAP / SURPLUS

$$\underline{\quad\quad\quad} \text{ A } - \underline{\quad\quad\quad} \text{ B } = \underline{\quad\quad\quad} \text{ \$ } \text{ GAP}$$

### Non-Real Estate

RSP: \$ \_\_\_\_\_

RSP: \$ \_\_\_\_\_

Pension Plans: \$ \_\_\_\_\_

Other: \$ \_\_\_\_\_