

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

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

## Gap Analysis

**2017**

**20\_\_**

### Lifestyle

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### Budget

### (A) Budget \$

### Income Sources

### (B) Income Sources

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

•

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

•

### Savings

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

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

### Investments

### A - B = GAP / SURPLUS

#### *Real Estate*

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

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

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

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

\_\_\_\_\_ - \_\_\_\_\_ = \_\_\_\_\_  
**A - B = GAP**

#### *Non-Real Estate*

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

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

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

OUR GOAL IS TO HELP YOU ACHIEVE YOURS