

Name: _____

Date: _____

Gap Analysis

2018

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: \$ _____

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Investments

Real Estate

Principal Residence: \$ _____

Principal Mortgage: \$ _____

LOC - Limit \$ _____

LOC - Utilized \$ _____

Rental Property Value: \$ _____

Rental Property Mortgages: \$ _____

Non-Real Estate

RSP: \$ _____

RSP: \$ _____

Pension Plans: \$ _____

Other: \$ _____

A - B = GAP / SURPLUS

$$\underline{\hspace{2cm}} \text{ A } - \underline{\hspace{2cm}} \text{ B } = \underline{\hspace{2cm}} \text{ \$ GAP }$$

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