

**\*PRIVATE & CONFIDENTIAL\***

## **GAP ANALYSIS CONSULTATION FORM**

The 'Gap Analysis©' helps you identify the gap in your current retirement plan and helps you build a strategy to address it. We start with the end in mind and work backwards to make sure every investment decision is made in the context of achieving your goal!

The 'Gap Analysis©' is designed to look at the following:

- Where are you at?
- Where are you going?
- What is your plan to get there?

**Please fill out the information below and return completed form to [clientservices@peterkinch.com](mailto:clientservices@peterkinch.com) or fax: 604-939-8306**

FIRST NAME: \_\_\_\_\_ LAST NAME: \_\_\_\_\_

EMAIL: \_\_\_\_\_ PHONE: \_\_\_\_\_

Do you own a Residence? \_\_\_\_\_ Value: \$ \_\_\_\_\_ Mortgage: \$ \_\_\_\_\_

LOC (accessible): \$ \_\_\_\_\_ LOC (utilized): \$ \_\_\_\_\_

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

Total Household Income: \$ \_\_\_\_\_

Total RSP: \$ \_\_\_\_\_ Non RSP Liquid Assets: \$ \_\_\_\_\_

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

OUR GOAL IS TO HELP YOU ACHIEVE YOURS