

Name: _____

Date: _____

Gap Analysis

20__

Lifestyle

Budget

Income Sources

\$ _____

(Gross Monthly Salary/Income)

\$ _____

(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: \$ _____

Non-Real Estate

RSP: \$ _____

RSP: \$ _____

Pension Plans: \$ _____

Other: \$ _____

20__

Lifestyle

(A) Budget \$

(B) Income Sources

• _____

• _____

A - B = GAP / SURPLUS

_____ - _____ = \$ _____
A B GAP

20__

Lifestyle

(A) Budget \$

(B) Income Sources

• _____

• _____

A - B = GAP / SURPLUS

_____ - _____ = \$ _____
A B GAP

OUR GOAL IS TO HELP YOU ACHIEVE YOURS