

Peter Kinch

OUR GOAL IS TO HELP YOU ACHIEVE YOURS

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
peter@peterkinch.com or tracy@peterkinch.com**

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: \$ _____

We will add your email to our database list so that you can receive Peter's Newsletter.
There is an option to unsubscribe at any time.

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