

# DUTHOIT FINANCIAL

INVESTMENTS / INSURANCE / BENEFIT PLANS / FINANCIAL PLANNING

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## SERVICE UPDATE QUESTIONNAIRE

Please complete the following questionnaire so that I may update your client file and provide ongoing professional service.

CLIENT NAME: \_\_\_\_\_ PHONE (HOME): \_\_\_\_\_ (WORK): \_\_\_\_\_

### Questions ???

- |  |   |
|--|---|
| <input type="checkbox"/> I would like to review my existing investment portfolio       | <input type="checkbox"/> I need advice on pension options and or Government benefits      |
| <input type="checkbox"/> I may have a need for additional Life or Disability Insurance | <input type="checkbox"/> I have questions on my employee benefits                         |
| <input type="checkbox"/> I have questions about my current coverage and/or policies    | <input type="checkbox"/> I want to make sure that I have the most cost effective mortgage |
| <input type="checkbox"/> I require investment advice on my RRSP's                      | <input type="checkbox"/> I would rather use E-mail than postal mail.                      |
|  | <input type="checkbox"/> Looking for more aggressive investments                          |
|  | <input type="checkbox"/> Looking for more conservative investments                        |

### INFORMATION ???

I'll call or send information on:

- |   |   |
|---|---|
| <input type="checkbox"/> Mortgages  | <input type="checkbox"/> Group RRSP's   |
| <input type="checkbox"/> Individual Disability Income Replacement Insurance | <input type="checkbox"/> Individual RRSP's, Annuities, or RIF's                   |
| <input type="checkbox"/> Life Insurance Options                             | <input type="checkbox"/> Mortgage Life Insurance                                  |
| <input type="checkbox"/> Group Insurance Benefits                           | <input type="checkbox"/> Non RRSP Tax Deferred Savings                            |
| <input type="checkbox"/> Education Saving Plans                             | <input type="checkbox"/> Personal Income Tax Savings Ideas                        |
| <input type="checkbox"/> Pension Maximization Ideas                         | <input type="checkbox"/> Estate Planning Brochures                                |
| <input type="checkbox"/> Investments, Interest Rates, Rates of Return       | <input type="checkbox"/> More frequent statements                                 |
| <input type="checkbox"/> Mutual or Segregated Funds                         | <input type="checkbox"/> Occasional summary statements of all my financial assets |

### LIFE STYLE CHANGES:

- |  |  |
|--|--|
| <input type="checkbox"/> Marital Status                | <input type="checkbox"/> Group Benefit changes                 |
| <input type="checkbox"/> New Children                  | <input type="checkbox"/> Banking Change (Attach sample cheque) |
| <input type="checkbox"/> Beneficiary                   | <input type="checkbox"/> Retirement Pending – Date _____       |
| <input type="checkbox"/> Started or changed a business | <input type="checkbox"/> Change of Address _____               |
| <input type="checkbox"/> New Occupation                |  |
| <input type="checkbox"/> Quit Smoking – Date _____     | <input type="checkbox"/> My E-mail address is: _____           |

### ADDITIONAL COMMENTS OR QUESTIONS:

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Insurance licensed sponsored by the Great West Life Assurance Company

Quadrus Investment Services Limited, mutual fund dealer

[www.duthoitfinancial.ca](http://www.duthoitfinancial.ca)

Please return the completed questionnaire in the enclosed envelope

For direct customer service phone Russ Duthoit @ 946-8122 or Lise Jestadt @ 946-4170