



# THE ROBIN HOOD STRATEGIES®

*We change people's lives.*

## **The Robin Hood Strategies – Cash Savings checklist**

Date: \_\_\_\_\_

Name: \_\_\_\_\_

DOB: \_\_\_\_\_

Smoker:  Yes  No

Name: \_\_\_\_\_

DOB: \_\_\_\_\_

Smoker:  Yes  No

- a) Do you pay yourself a T4 Salary as Incorporated Business Owner?  Yes  No
- b) How much do you pay yourself annually? \$ \_\_\_\_\_
- c) Do you pay your spouse a T4 Salary Income?  Yes  No
- d) How much do you pay your spouse annually? \$ \_\_\_\_\_
- e) Do you have Health Benefit coverage in place today?  Yes  No
- f) If "YES" to "e" how much are you spending annually? \$ \_\_\_\_\_
- g) What are your retirement Investment strategies today?

- |      |      |     |    |                     |          |
|------|------|-----|----|---------------------|----------|
| i.   | RRSP | Yes | No | Annual Contribution | \$ _____ |
| ii.  | TFSA | Yes | No | Annual Contribution | \$ _____ |
| iii. | RESP | Yes | No | Annual Contribution | \$ _____ |
| iv.  | CPP  | Yes | No | Annual Contribution | \$ _____ |
| v.   | Cash | Yes | No | Annual Contribution | \$ _____ |
| vi.  | Corp | Yes | No | Annual Contribution | \$ _____ |

- h) What are you invested in today?

- |      |              |                              |                             |
|------|--------------|------------------------------|-----------------------------|
| i.   | Mutual Funds | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| ii.  | Pooled Funds | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| iii. | ETF's        | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| iv.  | Stockbroker  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| v.   | SMA          | <input type="checkbox"/> Yes | <input type="checkbox"/> No |



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***The Robin Hood Strategies – Cash Savings checklist cont'd***

- i) Are your cash/corporate accounts fees tax deductible? Yes  No  Don't Know
- j) What annual income does your portfolio generate? \$ \_\_\_\_\_ Don't Know
- k) Is your risk management coverage structured tax efficiently? Yes  No  Don't Know
- l) Are your debts structured at the lowest rate possible? Yes  No  Don't Know
- m) Are you set up to "**Be Your Own Banker**"? Yes  No  Don't Know
- n) How much do you spend to live annually? \$ \_\_\_\_\_

**Information Required to complete – "The Robin Hood Strategies – Cash Savings Analysis"**

1. **Income earned** - T4 Slip for last year
2. **Health Benefits** – Group Insurance renewal document
3. **Investment statements** – Latest monthly copy
4. **Cash/Corporate Investments** – Dec. 31<sup>st</sup> stmt. & T3's/T5's
5. **Cash/Corporate Investments** – What are your accounting charges
6. **Insurance** – copy of your insurance summary statements
7. **Debts** - \$ Amount owing/Monthly payment/Interest rate charged