

Consultation Information Form

We will provide a Personal Retirement Planning Consultation for *you and your spouse*. Following receipt of this form, we will contact you to schedule an appointment. Initial consultation fee is \$250. Consultations may be in office or by telephone.

Name Mr./Mrs./Ms.	Date of Birth (Month/Day/Year) / /
Spouse's (Partner's) Name Mr./Mrs./Ms.	Date of Birth (Month/Day/Year) / /
Attending Consultation: Yes <input type="checkbox"/> No <input type="checkbox"/>	
Address	
City	Province
Postal Code	
Home Telephone Number ()	Email (Home)
Business Telephone Number ()	Email (Work)
Employer	Occupation

When would you like your appointment: As soon as possible _____ (month)

Please indicate the dates (or estimated dates/age) you would like to review in your Personal Retirement Outlook Statement. If no dates are indicated, we will select dates for you.

My retirement dates or age at retirement:

_____ Date or age _____ Date or age _____ Date or age

My spouse's (partner's) retirement dates or age at retirement:

_____ Date or age _____ Date or age _____ Date or age

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