

PERSONAL LEGACY BUILDER STRATEGY



CONFIDENTIAL

Fact Finder for Personal Legacy Builder Strategy for

(Client Name)

(day/month/year)

Facts gathered by:

(Advisor Name)

Our commitment to you

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What is the Personal Legacy Builder Strategy?

The Personal Legacy Builder strategy provides a tax-effective way to invest savings that are not required for retirement income. The main purpose is to optimize the eventual estate value and to leave these savings to heirs. By transferring accumulated savings or excess income to a life insurance policy, the value of the estate will increase immediately. Any additional investments permitted under the plan will grow on a tax-deferred basis and be paid out to the named beneficiary or beneficiaries tax-free on top of the life insurance benefit at the time of death.

Fact Finder for Personal Legacy Builder Strategy

Is the Personal Legacy Builder Strategy right for you?

Are you between the ages of 55 and 75?		
	Age(s):	
Are you in a high marginal tax bracket?		
	Tax Rate:	%
What size of legacy would you like to leave for heirs or a favourite cause?		
	Target Estate Value: \$	
Are you (both, if applicable) in good health?	Client 1	Client 2 (if applicable)
	yes <input type="radio"/> no <input type="radio"/>	yes <input type="radio"/> no <input type="radio"/>

How can we design a plan for you?

How much income is available to contribute to the growth of your Estate?	
	Amount: \$
	For Years OR For Life
Do you currently have non-registered investments earmarked for your Estate? Investment type:	
	Value: \$
	Growth: %
When do you want to leave your legacy, on your death or after both you and your spouse have passed away?	
	After First <input type="radio"/> or Both <input type="radio"/>

Client Data

	Client 1	Client 2 (if applicable)
Full Name		
Date of Birth		
Gender	<input type="radio"/> Male <input type="radio"/> Female	<input type="radio"/> Male <input type="radio"/> Female
Smoker Status	<input type="radio"/> Smoker <input type="radio"/> Non-Smoker	<input type="radio"/> Smoker <input type="radio"/> Non-Smoker

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Note: You have gathered all information needed to illustrate the Strategy.

You may optionally gather additional information below to assess other financial needs for your client(s).

Other Client Data

	Client 1	Client 2 (if applicable)
Name		
Address		
City, Province		
Postal Code		
Home Phone		
Cell phone		
Email Address		
Do you have a will? (Where?)	yes <input type="radio"/> no <input type="radio"/>	yes <input type="radio"/> no <input type="radio"/>
Employer		
Business Address		
Business Phone		
S.I.N.		
Bus. Income		
Other Income		
Business / Other Income Growth Rates	%	%

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Balance Sheet (Assets & Liabilities)

	+/-	Client 1	Client 2 (if applicable)
Client Name		\$	\$
Home Market Value	+	\$	\$
Home Mortgage	-	\$	\$
Bank Accounts	+	\$	\$
Other Assets	+	\$	\$
Loans	-	\$	\$
Credit Cards	-	\$	\$
Life Insurance Cash Values	+	\$	\$
RRSP / RRIF	+	\$	\$
Other		\$	\$
Other		\$	\$
Other		\$	\$
Approx. Net Worth	=	\$	\$
Group Pension Benefits	+	\$	\$
Disability Benefits	+	\$	\$

General Notes: For Income amounts, indicate if monthly (M) or Annual (A). List all other forms of income including CPP, OAS or Registered Pension Plan income.