



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

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Are you a REIN™ Member? \_\_\_\_\_ Do you have a Long Term Plan? \_\_\_\_\_

**Private Residence**

Do you own your own Residence?  Yes  No

Value: \$ \_\_\_\_\_ Mortgage: \$ \_\_\_\_\_ LOC: \$ \_\_\_\_\_

Monthly Mortgage Payments: \$ \_\_\_\_\_ Monthly Property Taxes \$ \_\_\_\_\_

**Household Income/Debt**

Total household income: \$ \_\_\_\_\_

Total RSP: \$ \_\_\_\_\_ Non RSP Liquid Investments: \$ \_\_\_\_\_

Monthly Credit Card Balance: \$ \_\_\_\_\_ Monthly Payments: \$ \_\_\_\_\_

**Rental Property**

Do you own Rental Property?  Yes  No

Market Value of Current Portfolio: \$ \_\_\_\_\_

Total monthly amount of mortgage payments on Rental

Portfolio: \$ \_\_\_\_\_

Gross Monthly Rental Income: \$ \_\_\_\_\_

How many properties do you plan to buy over the next 5 years? \_\_\_\_\_

Hand in to Calum Ross OR fax to 416-410-9491 OR scan and email to [clientcare@calumross.com](mailto:clientcare@calumross.com).

A more thorough review can be done if you send in actual mortgage statements.