

Get Started (48e)
Primary

12. Child? Add here (3e)
Dependent

13. Business? Trust? Add here
Close Corporation

1. START HERE
Look in "Notes" tab
R 1/yr

2. Other Incomes?
No? Click the trashcan ...
R 1/yr

3. Other Income?
Look in "Notes" tab
R 1/yr

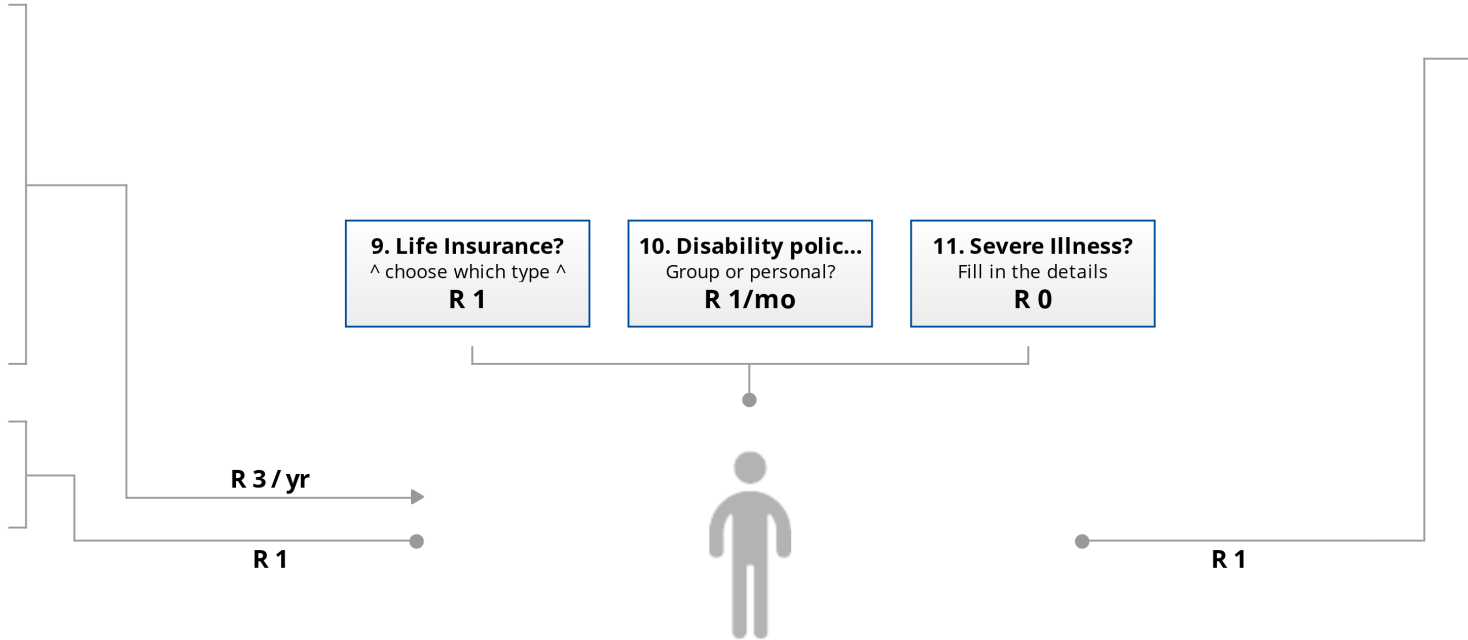
4. Retirement Fun...
Fill in the details
R 1

9. Life Insurance?
^ choose which type ^
R 1

10. Disability polic...
Group or personal?
R 1/mo

11. Severe Illness?
Fill in the details
R 0

5. Other Assets?
Investments / Art / etc.*
R 1



Get Started
12/12/1973 (e)

(R 1)

6. Liabilities?
CC debt / loans / etc.
(R 1)

7. House?
Do they own or rent?
R 1

8. If they own...
Remaining Bond?
(R 1)