

Primary Contact Name	Date <u> </u> / <u> </u> / <u>2010</u>
Partner(s)	Email <u> @ </u>
Address 1	Email2 <u> @ </u>
Address 2	Phone <u> </u>
City, Prov	Phone2 <u> </u>

Sentry Group Service	Notes	Opportunity %	Max Update info:
Consulting Estate Succession Individual Structure Corporate Structure Executive Compensation Buy Sell Partnership Key Man Valuation EPSP - Bus Plan/Bus Valuation BCC International Custom Spreadsheet Database Management Web Page Presence			Name1 Name2 DOB <u> </u> day/month/year - <u> </u> day/month/year SIN <u> </u> - <u> </u> ID <u> </u> - <u> </u>
Asset Management Registered Managed Assets Securities Notes Flow Thru Fixed Income Education Trust Spousal Trust Charitable Trust Fee Based Advising Segregated Funds Annuities			Projections
Financing & Mortgage Residential Commercial Reverse Mortgage Private Financing Personal Line of Credit			Capital Required
Risk Management Life Term Life Permanent Life Corporately Owned Key Man Buy Sell Living Benefits Long Term Care Critical Illness Disability Insurance Group Benefits Living Benefits Business Overhead Health & Welfare Trust Liability Errors & Omission Property			Needs
Tax & Accounting Tax Preparation GST, PST Preparation T Slip Preparation CRA Forms Financial Statement Personal Bookkeeping Business Bookkeeping Software Training Expense Tracking Cash flow Management Projections			Infor needed or on file NOA RSP Room
			Managing Partner Signature:
Legend 			