

# Travis Strain, CFP

## Financial Planner

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### Financial Health Survey

- 1) If you accumulate as many NET assets in the NEXT five years as you just did in the LAST five years, are you going to be satisfied with your progress at that point?
  - ☐ Yes
  - ☐ No
  - ☐ I don't know – show me more
- 2) Is the difference between what you OWN and what you OWE getting WIDER, NARROWER or STAYING THE SAME?
  - ☐ Getting wider
  - ☐ Getting narrower
  - ☐ Staying the same
  - ☐ I don't know – my financial advisor hasn't shown me lately
- 3) How many weeks of your typical month in retirement are FULLY funded by your current plans (based on date of retirement until end of projected life expectancy):
  - ☐ First week only
  - ☐ Two weeks
  - ☐ Three weeks
  - ☐ All four weeks
  - ☐ I don't know – help me to find out
- 4) Does your current life insurance pay you immediately to stay at home on the diagnosis of critical illness – or would you have to go to work whilst critically ill?
  - ☐ Pays me to stay at home whilst recovering
  - ☐ I would still have to go to work
  - ☐ I have no idea – please evaluate my situation with no obligation

- 5) How many of your children's further education is going to be fully funded, based on your current financial plan:
- 1 child
  - 2 children
  - 3 children
  - All of our children
  - I have no idea – please conduct an investigation at no expense
- 6) Do you draw the full compensation you are entitled to from your company to remunerate you for the second signature you gave to your bank as personal guarantees?
- Draw maximum compensation
  - Do not draw maximum compensation
  - How do I draw this compensation and how much should it be – please inform me
- 7) For how long does your partnership agreement guarantee the salaries of directors in the event of serious illness or disability?
- 1-3 months
  - 4-6 months
  - No provision in place, as far as I know. Please show me how to use company money to provide these securities
- 8) Are your legal arrangements structured between business partners in a manner that would force your surviving spouse to shop for groceries with company shares instead of ready cash in the event of your illness or demise?
- He/she would only inherit shares
  - He/she would receive cash
  - I have no idea – please consult with me on this issue

**If you need answers from any of these questions, maybe it's time we chatted for 20 minutes over coffee.**

**Please Call Travis Strain at (604) 308-6030 – [Mail@TravisStrain.ca](mailto:Mail@TravisStrain.ca)**