

# Income

## Income from Last Year

	You	Spouse/Partner
Earned		
Investment		
Rental		
Trust		
Other		
Total		

Was this representative of your income levels over the last several years? If not, please explain any differences.

## Income from Non-Registered Assets

Are you currently letting taxable distributions or interest stay within the investments, i.e. automatically reinvesting any realized earnings, or are you having these taxable amounts paid out as income each year?

You	Spouse/Partner

How familiar are you with the tax advantages of Series T Mutual Funds?

You	Spouse/Partner

Are you familiar with the tax advantages of prescribed annuities? ☐ Yes ☐ No

Would you like to improve your financial literacy? ☐ Yes ☐ No

What areas would you like to learn about first?

Advisor notes, comments and recommendations