

Retirement Income Planning and Taxes

Do you understand the difference in tax treatment for interest, dividends, and capital gains? (Please respond for each partner)

You	Spouse/Partner
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How much of your assets would you estimate are non-registered (income and/or growth exposed to income taxes)?

If you and your spouse/partner have separate assets or have been splitting assets, approximately how much is held in each name?

You	Spouse/Partner
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What would you estimate to be your marginal tax rate on your current income?

You	%	Spouse	%
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Advisor notes, comments and recommendations