



Reuter Retirement Income Quotation

Your personal information will only be utilized internally by Reuter Benefits to assist in providing accurate information to you.

By submitting this form, you consent to our use of this information for quotation purposes.

Name: _____ Date of Birth: _____

My Investor Profile is:

- Conservative
- Moderate
- Balanced
- Growth
- Aggressive

I am requesting that you:

Provide a projection of estimated monthly income based on:

Desired Retirement Age: _____
Desired Monthly Retirement Income: _____
Current Pension Funds: _____
Current RRSP Funds: _____
Current Non-Registered Funds: _____

Please Contact me by:

Mail: _____
(Street) (Town or City) (Province) (Postal Code)
Telephone: _____
Fax: _____
Email: _____

'Making it our business to accommodate your needs today and tomorrow'

Confidential Family Budget Worksheet

	Current Monthly Amount	Estimated Monthly Amount at Retirement
Housing		
Mortgage		
Rent		
Heat/Gas		
Water		
Hydro		
Phone		
Cable		
Groceries		
Maintenance		
Insurance		
Miscellaneous		
Transportation		
Loan/Lease Payment		
Repairs		
Auto/Gas		
Parking		
Insurance		
Auto Club		
Miscellaneous		
Entertainment		
Restaurant		
Club Memberships		
Hobbies		
Vacations		
Miscellaneous		
Personal		
Prescriptions		
Church / Charities		
Gifts		
Clothing (incl. Dry cleaning)		
Medical / Dental		
Miscellaneous		
Other		
Savings / Investments		
Life Insurance		
Education		
Income Tax Payments		
Debt Reduction		
Union Dues		
Pet Care		
Miscellaneous		
Total Expenses	\$	\$
Net Income		
Salary		
Canada Pension Plan		
Old Age Security (age 65)		
RRIF Income		
Annuity/LIF Income		
Other Income		
Total Income	\$	\$
Difference	\$	\$