



# Leveraged Supplementary Retirement Questionnaire

## Client

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Male     Female

Class: \_\_\_\_\_

Date of Birth: 

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 Age: \_\_\_\_\_  
M M D D Y Y

Province: \_\_\_\_\_

Personal Tax Rate: \_\_\_\_\_

## Spouse

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Male     Female

Class: \_\_\_\_\_

Date of Birth: 

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 Age: \_\_\_\_\_  
M M D D Y Y

**AVP**

# Leveraged Supplementary Retirement Questionnaire

## LSRA General Information

Current Annual Income: \_\_\_\_\_ Annual Increase: \_\_\_\_\_

Life Expectancy: \_\_\_\_\_ Loan Rate: \_\_\_\_\_

## Investment Assumptions

Rate of Return: \_\_\_\_\_

Portfolio Type:  Conservative  Moderate  Moderate Growth  Growth

Custom

Interest: \_\_\_\_\_ Dividend: \_\_\_\_\_ Capital Gain: \_\_\_\_\_ Unrealized Cap. Gain: \_\_\_\_\_

## Income

Income Model:  Calculate Target Percentage Level  Solve for Amount  
 Solve for Duration  Enter an Amount - No Solve  
 Schedule Income

Income Amount: \_\_\_\_\_

Adjustment Model:  None  Specify Amount  Specify Rate  
Adjustment Amount: \_\_\_\_\_  
Adjustment Rate: \_\_\_\_\_

From Age: \_\_\_\_\_ To Age: \_\_\_\_\_

Target Percentage Level: \_\_\_\_\_

## Perspecta

Initial Sum Insured: \_\_\_\_\_

Deposit Model:  Maximum Level Premium Deposit Amount: \_\_\_\_\_

Deposit Period: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

Death Benefit Option:  Level  Increasing  Hybrid

Cost of Insurance:  Level  YRT-85/20  YRT-100



**AVP**

This illustration is not complete without a Standard Life Client Illustration

Thursday, October 27, 2005