

<b>Primary Contact Name</b> _____	<b>Date</b> _____	_day / _mth /2010
<b>Partner(s)</b> _____	<b>Email</b> _____	@
<b>Address 1</b> _____	<b>Email2</b> _____	@
<b>Address 2</b> _____	<b>Phone</b> _____	
<b>City, Prov</b> _____	<b>Phone2</b> _____	

Sentry Group Service	Notes	Opportunity %	Max Update info:
<b>Consulting</b> Estate Succession Individual Structure Corporate Structure Executive Compensation Buy Sell Partnership Key Man Valuation EPSP - Bus Plan/Bus Valuation BCC International Custom Spreadsheet Database Management Web Page Presence			Name1                      Name2  DOB                      day/month/year      -      day/month/year  SIN                      -  ID                      -
<b>Asset Management</b> Registered Managed Assets Securities Notes Flow Thru Fixed Income Education Trust Spousal Trust Charitable Trust Fee Based Advising Segregated Funds Annuities			<b>Projections</b>
<b>Financing &amp; Mortgage</b> Residential Commercial Reverse Mortgage Private Financing Personal Line of Credit			<b>Capital Required</b>
<b>Risk Management</b> Life Term Life Permanent Life Corporately Owned Key Man Buy Sell Living Benefits Long Term Care Critical Illness Disability Insurance Group Benefits Living Benefits Business Overhead Health & Welfare Trust Liability Errors & Omission Property			<b>Needs</b>
<b>Tax &amp; Accounting</b> Tax Preparation GST, PST Preparation T Slip Preparation CRA Forms Financial Statement Personal Bookkeeping Business Bookkeeping Software Training Expense Tracking Cash flow Management Projections			<b>Infor needed or on file</b>  <b>NOA</b>  <b>RSP Room</b>
			Managing Partner Signature:

