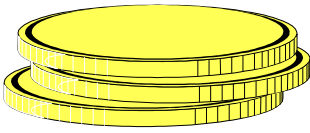


**DON'T** trust any advice until you autopsy the **PROFILE** of the practitioner behind it!



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## PROFILE: Financial Products "Advisor = Salesperson" "Fiduciary"

NAME: \_\_\_\_\_ LICENCE(S): \_\_\_\_\_ ( \_\_ / \_\_ / \_\_ )

TOTAL Client Assets: \$ \_\_\_\_\_ GROSS Annual Comm.: \$ \_\_\_\_\_ Yr: \_\_\_\_\_

TOTAL Client Assets By Dollar (\$) Amounts Within The Following Investment Categories	TOTAL Client \$\$ Assets By % Per Asset Category	TOTAL Annual Income by % Yr. Ending __ / __ / __
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**FUNDS: Mutual, Index, Pooled, Wrap, ETF (# \_\_\_ )** \_\_\_\_\_ % \_\_\_\_\_ %

AIM Trimark	55%		
Fidelity	30%		
Templeton	10%		
Other	___%		
Total	100%	= Mutual ___% + Hedge ___% + Pooled ___% + Wrap ___% + ETF ___%	

**COMMON STOCKS (# \_\_\_ )** \_\_\_\_\_ % \_\_\_\_\_ %

ETF's	15%
TSE	35%
NYSE/AMEX	24%
NASDAQ	18%
Other	___%
Total	100%

**FIXED INCOME** \_\_\_\_\_ % \_\_\_\_\_ %

Strips	35%
MBS	30%
Bonds	20%
Income Trusts	5%
Other	___%
Total	100%

**SHORT SALES** \_\_\_\_\_ % \_\_\_\_\_ %

**OPTIONS, DERIVATIVES, FUTURES** \_\_\_\_\_ % \_\_\_\_\_ %

Covered Calls	100%
Futures	NIL%
All Other	___%
Total	100%

**LIMITED TAX PARTNERSHIPS** \_\_\_\_\_ % \_\_\_\_\_ %

**REAL ESTATE INVESTMENT TRUST'S** \_\_\_\_\_ % \_\_\_\_\_ %

**INSURANCE PRODUCTS** \_\_\_\_\_ % \_\_\_\_\_ %

Annuities	55%
Life & Health	25%
Property	10%
Disability	5%
Other	___%
Total	100%

**TOTALS** 100% 100%

FROM # \_\_\_ Names of Insurance Companies Where Policies Are Placed, The Lion's Share Are With:

<u>Annuities</u>		<u>Life &amp; Health</u>		<u>Property</u>		<u>Disability</u>	
Ind. Alliance	45%	TransAmer	65%	ABCD	80%	Paul Rev	100%
Crown Life	30%	Canada Life	25%	EFGH	15%		
Standard	20%						
Other	___%	Other	___%	Other	___%	Other	___%
Total	100%	Total	100%	Total	100%	Total	100%

**"Better disclosure induces 'investorism' and enhances industry integrity!"**

