

# THE MONEYSENSE COMPLETE FINANCIAL PLAN KIT

## WORKSHEET #7: HOW YOU ARE CURRENTLY INVESTED

Based on Month Day/Year statements

CASH <i>(eg. Bank Accounts, Canada Savings Bonds, GICs, Term Deposits, Money Market Mutual Funds)</i>		BONDS / INCOME <i>(eg. Government or Corporate Bonds, Bond or Income Mutual Funds)</i>		STOCKS / EQUITY / SHARES <i>(eg. Individual Stocks, Equity Mutual Funds or Employee Share Purchase Plan)</i>	
INVESTMENT	\$AMOUNT	INVESTMENT	\$AMOUNT	INVESTMENT	\$AMOUNT
<i>(eg. ING Investment savings)</i>	(\$1,500)				
<b>TOTAL CASH TYPE INVESTMENTS:</b>		<b>TOTAL BOND TYPE INVESTMENTS:</b>		<b>TOTAL STOCK TYPE INVESTMENTS:</b>	
	%		%		%
				<b>TOTAL INVESTMENTS:</b>	

Source: [www.moneycoachescanada.ca](http://www.moneycoachescanada.ca), [www.womensfinanciallearning.ca](http://www.womensfinanciallearning.ca)

