

| Expense Type                             | Supplier | Your Account Number | Pre-Authorized Payment | Contact Number | Completed ✓ |
|--|----------|---------------------|------------------------|----------------|-------------|
| <b>Home Expenses</b>                     |          |                     |                        |                |             |
| Hydro                                    |          |                     | \$                     |                |             |
| Heat                                     |          |                     | \$                     |                |             |
| Gas                                      |          |                     | \$                     |                |             |
| Water                                    |          |                     | \$                     |                |             |
| Taxes                                    |          |                     | \$                     |                |             |
| Mortgage                                 |          |                     | \$                     |                |             |
| Other                                    |          |                     | \$                     |                |             |
| <b>Loans</b>                             |          |                     |                        |                |             |
| Car Loan                                 |          |                     | \$                     |                |             |
| Credit Line                              |          |                     | \$                     |                |             |
| Other Loans                              |          |                     | \$                     |                |             |
| Other Loans                              |          |                     | \$                     |                |             |
| <b>Insurance</b>                         |          |                     |                        |                |             |
| Home                                     |          |                     | \$                     |                |             |
| Auto                                     |          |                     | \$                     |                |             |
| Other                                    |          |                     | \$                     |                |             |
| <b>Savings and Pre-Authorized Debits</b> |          |                     |                        |                |             |
| RRSP Savings                             |          |                     | \$                     |                |             |
| RESP Savings                             |          |                     | \$                     |                |             |
| Investment Savings                       |          |                     | \$                     |                |             |
| Charitable Donations                     |          |                     | \$                     |                |             |
| Other                                    |          |                     | \$                     |                |             |

I would like a Kindred Investment Specialist to contact me regarding my investments

I would like a Kindred Account Manager or Personal Lending Specialist to contact me regarding my loans and mortgage

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Best time to call: \_\_\_\_\_ Signature: \_\_\_\_\_

|                        |                      |
|------------------------|----------------------|
| <b>OFFICE USE ONLY</b> | Date: _____          |
| Member Name: _____     | Member Number: _____ |