



Checklist

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

I would like an MSCU Financial Planner to contact me regarding my investments

I would like an MSCU Account Manager to contact me regarding my loans and mortgage

Name: _____ Phone Number: _____

Best time to call: _____ Signature: _____

OFFICE USE ONLY	Date: _____
Member Name: _____	Member Number: _____