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What to Bring With You

We have created this checklist to give you an idea of what information we will need to help you with your financial planning. Completing the questionnaire and bringing the following items will make for a successful first meeting.

* List of goals and/or objectives for the financial planning exercise
* List of specific questions that you want answered
* List of assets and liabilities (a net worth statement)
* List of income and expenses (a cash flow statement)
* Copies of investment statements, RRSP statements and pension statements
* Details of your outstanding loans
* Copy of a recent pay stub
* Copies of your most recent tax returns and notice of assessment
* Copies of your latest CPP statement
* Copies of your current wills, power of attorney, and personal directives
* Details of your insurance coverage (life, disability, other)
* Copies of employee benefits and pension plan booklet (if applicable)
* Copies of financial statements and corporate tax return (if applicable)
* Any other documentation that might impact your financial situation.