What to bring to your meeting with a Financial Planner.

Do you have an appointment with a Financial Planner? Come prepared! Please use the list below to make sure you bring all the documentation you will need. Be sure to include these for both yourself and your partner. If you do not have access to a photocopier the originals are fine, we will be returning them to you.

- ☐ Last three Payroll Stubs
- ☐ Employee Benefits Booklet(s)
- ☐ Most Recent Employee Benefits Statement(s)
- ☐ Most Recent Pension Plan Statement(s) and/or Plan Booklets
- ☐ Last Two Years Personal Income Tax Returns
- ☐ Notices of Assessment
- ☐ Most Current Financial Statements (for all Corporate, Proprietor, or Partnership Interests)
- ☐ CPP/QPP Statement of Contributions

Most current statements of investments and/or copies of:

- ☐ RRSPs
- ☐ GICs
- ☐ CSBs
- ☐ Stock Portfolio
- ☐ Mutual Funds
- ☐ Mortgages Receivable
- ☐ Limited Partnership Offering Memorandum, Executive Summary and most current correspondence
- ☐ Documentation for all Current Liabilities (Mortgages, Lines of Credit, Credit Card Statements, etc.)
- ☐ Life, Disability, Critical Illness and Long Term Care Insurance Policies
- ☐ General Insurance Policies (Auto, Homeowners, etc.)
- ☐ Wills and/or Powers of Attorney
- ☐ Marriage Contract
- ☐ Divorce/Separation Agreement
- ☐ Shareholder's/Business Agreements
- ☐ Family Trust Documentation
- ☐ Any other relevant documentation that relates to your financial situation that you believe we should be looking at.