**Full Checklist – CANADIAN VERSION**

It is important you bring the following documents with you to our next meeting so we can complete *Your Personal Financial Profile.*

**Names, Address, Birth Date and Social Insurance Number**

* Children
* Dependents

**Names, Address and Telephone Number**

* Accountant
* Lawyer/Attorney
* Insurance Agent

**CASHFLOW PLANNING**

* Statements for your regular Saving Accounts
* Bank Checking Account Statements and Check Book
* Mortgage Statements
* Statement of Personal Loan and/or Line of Credit
* Credit Card Statements

**TAX PLANNING**

* Tax Returns from the previous 2 years
* All Property Tax Receipts
* Information on Holding Companies or Limited Partnerships

**RETIREMENT PLANNING**

* Retirement Pension Plan Statements (private and public pensions)
* Statements from your Registered Retirement Accounts (RRSPs and RRIFs)
* Statements from Non-Registered Retirement Investments
* CPP and/or OAS Benefits Statement

**INVESTMENT STRATEGIES**

* Brokerage Account Statement
* Mutual fund Statement
* Statement from Trust Companies
* Bank Statements pertaining to investments
* Stock Certificates and/or Bond Certificates
* Annuity Contract Statements

**YOUR FAMILY’S SECURITY**

* Health Insurance Policy
* Life Insurance Policy
* Disability Insurance Policy
* Extended Care or Critical Illness Insurance Policy

**CARING FOR OTHERS**

* Statements from your RESP Plan (Educational Savings Plan)
* Other Educational Savings
* Registered Disability Savings Plan (RDSP)
* Other Financial Information & Needs on Caring for those with Special Needs
* Financial Information & Needs Related to Caring for Elderly Parents

**YOUR LEGACY**

* A current copy of your Will
* A current copy of your Power of Attorney
* A current copy of your Enduring Power of Attorney
* Trust information
* Deeds to all Property

**BUSINESS PLANNING & SUCCESSION**

* Partnership Agreements
* Buy-Sell Agreements
* Key-Man or Other Insurance Policy

**SPECIAL SITUATIONS OR OTHER**

* Other (specify)
* Other (specify)
* Other (specify)