

DOCUMENTS CHECKLIST

Name

Date

1. Copy of Current Financial Plan

Completed

Notes

2. Current Investment Statements

Completed

Notes

3. Real Estate Holdings

Completed

Notes

**4. Employer Sponsored Programs -
Statements & Booklets**

Completed

Notes

**5. Life and Health Insurance Policies -
Personal & Corporate**

Completed

Notes

6. Income Tax Returns - Last 2 Years

Completed

Notes

7.Current CRA Notice of Assessment

Completed

Notes

8. Mortgage and LOC Statements

Completed

Notes

**9.Wills, Power of Attorney, Trusts,
Guardianship, Health Care Directive**

Completed

Notes

10.Canada Pension Plan Statements

Completed

Notes