Before We Begin...

One of the first steps in the financial planning process is a detailed review of your current financial situation. This is accomplished using a *Personal and Financial Data Questionnaire* which is designed to help me gather all the required information for your customized financial plan. This information is necessary so we can create a complete and thorough picture of your *current* and *future* financial situation.

Please try to have the following items on hand:

- ☐ Full tax returns and Notice of Assessments for both yourself and your spouse - past 2 years (**include all T-slips and schedules**)
- ☐ Pension statement and booklet from your employer for yourself and your spouse
- ☐ Benefits statement and booklet from your employer for both yourself and your spouse
- ☐ Most recent pay stubs for both yourself and your spouse
- ☐ All life insurance and disability insurance policies
- ☐ Budget of your personal and living expenses
- ☐ Details of any planned major expenditures (home renovations, new car, vacation etc.)
- ☐ Latest statements from employer sponsored RRSP and savings plans, stock options plans or stock purchase plans
- ☐ Latest statements from trust companies, brokers, investment companies and banks pertaining to RRSPs and other investments
- ☐ Details of any credit card debts, personal loans, mortgages or lines of credit
- ☐ Copies of your current will(s) and powers of attorney
- ☐ Marital agreement(s)
- ☐ Copies of business buy/sell, partnership or shareholder agreements
- ☐ Severance pay and pension option documents
- ☐ Other relevant documentation

Keep in Mind...

The more information you provide, the more realistic your financial plan will be. If you are unsure of an exact value for any piece of information, please give it your best estimate.

You may find it easier to provide us with copies of these documents. Please bring them to our planning meeting. Thank you.

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