

Information gathering checklist

Please have the following information available for our next meeting:

- | | |
|---|--------------------------|
| Tax Returns | <input type="checkbox"/> |
| Investment Statements
(from all companies) | <input type="checkbox"/> |
| Employer's Pension & RRSP
Statements | <input type="checkbox"/> |
| Benefit Booklet | <input type="checkbox"/> |
| CPP Statement | <input type="checkbox"/> |
| Life Insurance Policies
(anniversary statements) | <input type="checkbox"/> |
| Disability Policies | <input type="checkbox"/> |
| Mortgage Statements | <input type="checkbox"/> |
| Other Loan Statements | <input type="checkbox"/> |
| Other Loan Statements | <input type="checkbox"/> |
| Power of Attorney & Latest Will | <input type="checkbox"/> |

Notes
