

New Client Relevant Financial Information

- Most Recent Investment Portfolio Statements
Please include all of the following: RRSP's, Group RSP's,
Canada Savings Bonds, Education Savings Plans, TFSA's, Stocks
- Most Recent Pension Plan/Profit Sharing Statement
- Last 2 years personal and or corporate tax returns
- Notice of Assessments received from Canada Revenue Agency
- Proof of Income Sources in the form of a payroll stub or receipt
Please include Employment, Self-employment, Rental, Trust, etc
- Mortgage and Loan Statements, including private arrangements
Please include the following details: Balance owing, Term,
Payment, Interest Rate, Amortization
- Credit Card Statements
- Employee Benefits Booklet(s)
- Life, Disability, Critical Illness and Long-term Care Insurance Policies
- Last Will and Testament
- Power of Attorney
- Marriage Contract (Pre-nup) if applicable
- Shareholder's/Business Agreements if applicable