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