DOCUMENT CHECKLIST

This document contains a list of materials we would like you to bring to your discovery meeting. These materials will help make sure that I am able to comprehensively review your personal situation. Not all documents listed below will be applicable to you. Where applicable, please bring copies of the following documentation for you and your spouse:

Personal

- [ ] Investment statements not held with CIBC Wood Gundy (Registered, Non Registered, TFSA, RESP)
- [ ] Most recent Canada Revenue Agency (CRA) / Quebec Notice of Assessment
- [ ] Most recent T1 General Tax Return (first four pages)
- [ ] Company Pension Plan statement(s)
- [ ] Canada / Quebec Pension Plan Statement(s)
- [ ] Personal Loan statements
- [ ] Line of Credit statements
- [ ] Mortgage statements
- [ ] Copies of Life, Disability, Critical Illness and Long-Term Care Insurance Policies
- [ ] Copies of Insurance Plan Contracts
- [ ] Group Insurance Plan statement(s)
- [ ] Estimate of your current lifestyle expenses
- [ ] Copies of any Trust agreements
- [ ] Copies of your most recent Will
- [ ] Copies of Powers of Attorney for Property and Personal Care / Quebec Protective Mandate
- [ ] Copies of Cohabitation agreements, separation agreements, divorce orders
- [ ] Most recent paystub
- [ ] Others:

Business

- [ ] Corporate structure diagram
- [ ] Partnership and/or Shareholder's Agreements
- [ ] Account statements (if applicable)
- [ ] Copies of corporate insurance policy statements
- [ ] Financial Statements
- [ ] Others

Other

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