MEETING CHECKLIST

Ashley D'Silva
INSURANCE & INVESTMENT ADVISOR

To make the most of our time together, please use this checklist to prepare for our first meeting.

Don't worry if you are unable to collect all this information. We are taking the first step to give you greater control over your finances.

Self	Spouse	
		General
☐	☐	Please complete Financial Perspective
☐	☐	Please complete Cash Flow Summary
☐	☐	Please complete Net Worth Summary
		Account Statements
☐	☐	Bank & Saving accounts
☐	☐	Tax-free savings account
☐	☐	GIC & Government Saving Bonds
☐	☐	Investment accounts
☐	☐	RRSPs
☐	☐	Employee group pension statement
		Insurance Policy Documents (including coverage for children)
☐	☐	Life insurance
☐	☐	Critical Care insurance
☐	☐	Disability insurance
☐	☐	Mortgage insurance
☐	☐	Long-term care insurance
☐	☐	Health & dental coverage
☐	☐	Employer Group Benefits summary/booklet/recent statement
		Other Information
☐	☐	Recent pay stub
☐	☐	Notice of assessment (taxes)
☐	☐	Recent CPP statement (you can get a copy from your Service Canada online Account)
		Legal
☐	☐	Current Will
☐	☐	Power of Attorney
		Business
☐	☐	Year-end financial statements
☐	☐	Corporate tax return