

## Checklist: **Initial Meeting**

Please bring what you can from the following list:

- Recent investment statements such as RRSPs, TFSAs, employment pension plan.
- Recent Notice of Assessment or tax return
- Monthly expenditures (budget, bank statements or see Cash Flow Plan)
- Life insurance policy
- Group benefits booklet
- Short term goals (2-5 years)
- Long term goals

Looking forward to meeting with you.

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