

Checklist: **Second Opinion**

Please bring the most recent documents from the following list:

- RRSP statement(s)
- RESP statement(s)
- Non-registered account(s)
- TFSA statement(s)
- Employment pension plan statement(s)

We will also be discussing your risk tolerance and your goals during the meeting.

Looking forward to meeting with you.

ALYNN GODFROY

FINANCIAL RETIREMENT SPECIALIST

alynn@godfroyfinancial.com | 519-258-1995 | www.godfroyfinancial.com