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What to bring to our first meeting

We understand and appreciate that gathering all these documents can take some time. Each document on the list below contains important information and the more we know about your finances the better the advice we can provide. While many documents can be provided after the first meeting, it is best to bring as much information as possible. **The key items are those beginning with (*).**

Check if applicable

- ☐ *Most recent investment statements
- ☐ *Most recent notice of assessment from the Canada Revenue Agency
- ☐ *Recent pay stubs or estimates of pay before and after deductions
- ☐ *Estimated monthly expenditures (budget)
- ☐ *Most recent pension projection (if you have a pension)
- ☐ Most recent tax return
- ☐ Personal loan / line of credit / mortgage statement
- ☐ Insurance coverage booklet & statement of coverage from your employer
- ☐ Private insurance policies (life insurance, disability insurance etc.)
- ☐ Wills / Powers of attorney

Should you have any questions at all about one of the documents, please call our office at (613) 841-8550 and we would be pleased to help.