

OUR PLANNING MEETING

DETAILS

TO DO

Date: _____

Time: _____

Location: _____

Please remember to have the following papers available at our planning meeting:

- Copies of all life insurance policies, including recent status notices showing any policy loans, premium amounts or dividends on deposit.
- Copies of any disability insurance policies you may have which provide income replacement in the event of an accident or sickness.
- Copies of any Critical Illness or Long Term Care policies that you may have.
- Latest copy of your benefits statement from your employer. This should include a recent status of group insurance benefits, pension plans and other related information.
- Documents showing current values of any personal retirement programs you may have.(RRSP's, Group RRSP's, Annuities etc.)
- Copies of the most recent financial statements of any business in which you own an interest.
- Copies of your most recent tax returns (if applicable).

THE CLIENT WORKBOOK

You should have a set of personal financial statements to:

- * understand your situation
- * measure your progress
- * avoid making inaccurate choices

Most people complete financial statements, but leave them:

- * with the mortgage broker
- * with the credit card company
- * with the banker

After our planning meeting, you may keep these statements:

- * to help you assess your needs
- * to help you make decisions
- * to help you plan for the future

In order to complete this form look for information in your:

- * financial files
- * cheque book register
- * credit card statements

Most people take less than an hour to complete the **Client Workbook**. Please do your best to have this form completed before our planning meeting. The information will save time in our meeting and will give you valuable data to use throughout the next year. If you do not know the exact amount, please estimate.