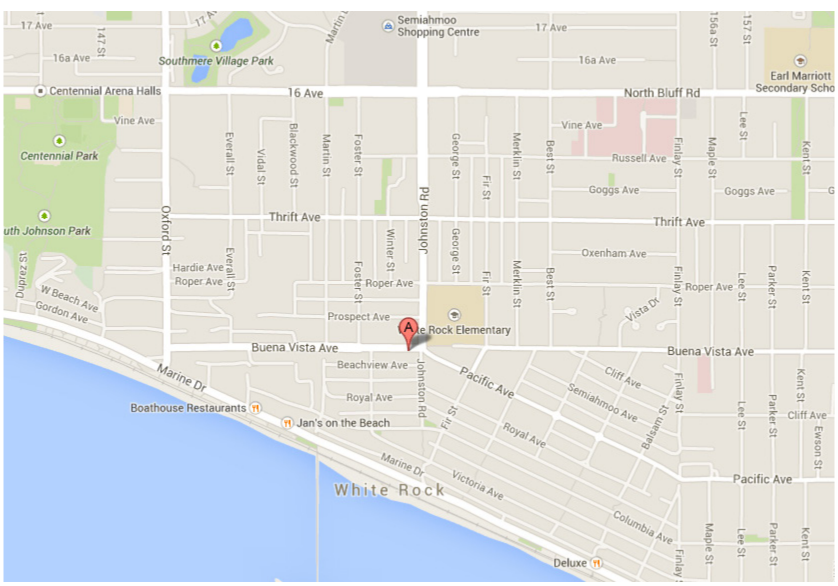
What to Bring

INVEST WITH VISION

To make our time together most effective, could you please bring the following documents to help us complete your Personal Wealth Management Strategy:

- ☐ Recent statements from your registered and non-registered accounts
- ☐ Employment benefit records (including any recent pension statements)
- ☐ Most recent CPP statements
- ☐ Details of loans
- ☐ All insurance policies (life, critical illness, disability, etc.)
- ☐ Tax returns from the previous 3 years
- ☐ Most Recent income tax Notice of Assessment
- ☐ Existing financial and estate plans

- ☐ Other: ______________________________



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