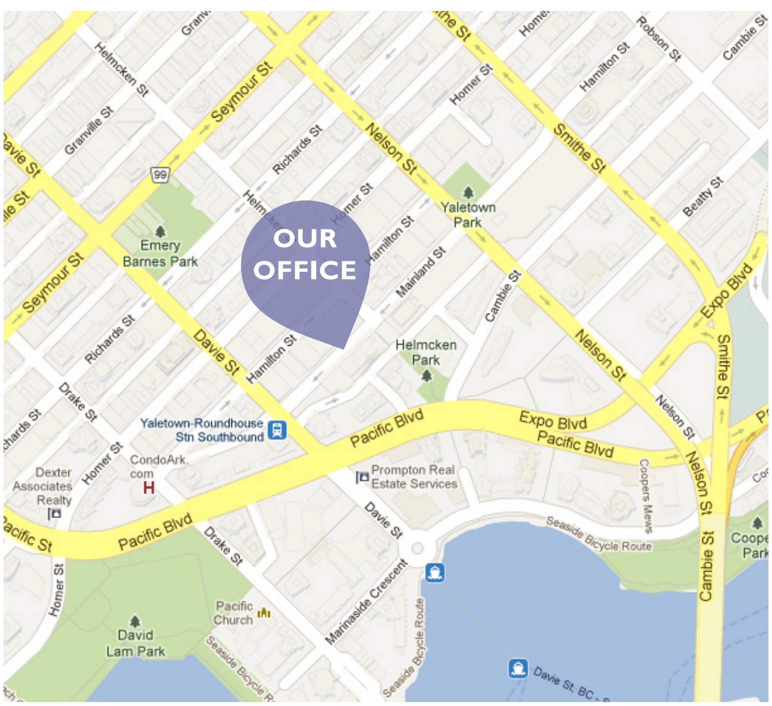
What to Bring

Live *your* dream.

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

- ☐ A copy of your latest tax return and tax assessments
- ☐ Photocopies of your latest investment statements, e.g. RRSPs, GICs, stocks, bonds, mutual funds, etc.
- ☐ Insurance Policies – life, critical illness, long term care and disability
- ☐ A copy of your and your spouse's Will and Power of Attorney
- ☐ Banking statement, mortgage and other debt amounts
- ☐ Company pension booklets and statements
- ☐ Information on your group benefits
- ☐ Other: ______________________________



YOUR TEAM IN YALETOWN

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