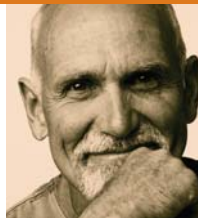




## Financial advisor checklist: What to bring to your meeting

- ✓ A notepad and pen for taking notes
- ✓ Statements of any current investments
- ✓ A recent pay stub
- ✓ A mortgage statement, if you have one
- ✓ Insurance plan policies and account numbers of current investments
- ✓ Identification
- ✓ Past tax returns and Notices of Assessment
- ✓ A list of your investment objectives
- ✓ Your thoughts about your risk tolerance
- ✓ Your bank account statement
- ✓ Your cheque book (voided cheques are required to set up any pre-authorized cheque withdrawals)
- ✓ A list of questions for the advisor, such as:
  - How much should I contribute to my RRSP each year?
  - What asset allocation do you recommend for me?
  - What rate of return should I expect from my portfolio?





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