Your Financial Planning Checklist

As we discussed, gathering the right information is a critical part of preparing for the planning process. The following list will assist you to ensure we have all the information for our next meeting. If you have any questions or if you are not able to gather some of the information before our meeting, please do not hesitate to call me. I look forward to helping you achieve your goals.

Please Provide:

- [ ] Notice of Assessment/ Most Recent Tax Return/Add us as Level 1 Online access to your CRA account- Rep ID MR97MF3
- [ ] Pay stub for the last period
- [ ] Employer Pension Statement
- [ ] Canada Pension Plan (CPP) Statement (available through your myservicecanada account)
- [ ] List of Assets (Ownership and Amount) ex. Primary Residence & Rental Properties
- [ ] Registered Savings Plan (RSP) Statements
- [ ] Registered Education Savings Plan (RESP) Statements
- [ ] Investment Statements (Guaranteed/Term Deposit/Mutual Funds/Stocks)
- [ ] Most Recent Chequing Account Statement
- [ ] Personal Loan &/or Line of Credit Statements
- [ ] Mortgage Documents (please include most recent statement)
- [ ] Employer Benefits Statement
- [ ] Personal Budget
- [ ] Life Insurance Policy (please include most recent statement)
- [ ] Disability Insurance Policy (please include most recent statement)
- [ ] Wills, Powers of Attorney, and other relevant legal documentation (trusts, proxies, etc.)

Please also start thinking about your goals
(Short term < 3 years/Medium term 3 – 5 years/Long term > 5 years)

Awaken Wealth Management Ltd.
3915 E Thames Road, Regina, SK S4V 3A5
awakenwealth.ca | scott@awakenwealth.ca

306.596.6156
306.518.7799
awakenwealth

awaken wealth