

FINANCIAL PLANNING CHECKLIST

Personal Documents

- Life Insurance Policy
- Accident / Sickness Insurance
- Property Insurance Policy
- Liability Insurance Policy
- Current Insurance Policy
- Investment Statement
- RRSP Statements
- Current Investment Offers
- Tax Returns (3-5yrs.)
- Will
- Power of Attorney
- Trust Instruments
- Separation / Divorce Agreement
- Marriage Contract
- Personal / Family Budget
- Sale / Purchase Contract
- Deeds, Mortgages, Land Contracts
- Leases
- Employee / Benefit Statement
- Other

Business Documents

- Tax Returns (3-5 yrs.)
- Financial Statements (3-5 yrs.)
- Deferred Compensation Plan
- Registered Pension Plan
- Deferred Profit Sharing Plan
- Stock Option / Purchase Agreement
- Buy-Sell Agreement
- Employment Agreement
- Employee / Benefit Books
- Articles of Incorporation
- Merger / Acquisition Agreement
- Partnership Agreement
- Company Patents
- Equipment Leasing
- Other