OBINSON + ASSOCIATES Inc
FINANCIAL PLANNING

Documents Required Checklist

Name: ______________________________ **Date:** ____________________

Please have the following documents available for review and discussion during our initial meeting(s).

	Tax Returns for the past 2 years (along with Notice of Assessments)
	Copies of Recent Pay Stubs
	List of Investment Assets / RRSPs (including recent statements)
	List of Liabilities (including recent statements)
	Bank Statements for (period)
	Life & Disability Insurance Policies
	Employee Benefit and Pension Plan Statement
	Canada Pension Plan Statement
	Household, Auto and Liability Insurance Policies
	Wills (client and spouse)
	Other (any other issues you wish to review or think is necessary) Details /Notes: ____________________ ____________________ ____________________