PREPARING FOR YOUR MEETING

Things to think about:

- ☐ What are the top three questions you have about your finances?

  1. ______________________________
  2. ______________________________
  3. ______________________________

- ☐ What is your biggest financial worry or concern?

- ☐ What would you most like to change about your financial situation over the next 3 years?

What are your priorities?

Rate each financial goal based on how important it is to you

(1 = not at all important; 5 = very important)

Paying down mortgage or other debt	1	2	3	4	5
Gaining control over my spending	1	2	3	4	5
Saving for children's education	1	2	3	4	5
Saving for retirement	1	2	3	4	5
Understanding my investments	1	2	3	4	5
Knowing I have the right investment mix	1	2	3	4	5
Active involvement in managing my investments	1	2	3	4	5
Developing income withdrawal strategies for/in retirement	1	2	3	4	5
Providing a comfortable lifestyle for my family in the event of my death	1	2	3	4	5
Creating/preserving an estate for my heirs	1	2	3	4	5
Leaving a legacy, philanthropy	1	2	3	4	5

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Add any other financial goals or objectives you want to achieve here:

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What to bring?

In order to allow a meaningful discussion of your financial situation, please bring any documents from the list below that you think would be useful to your individual session with a Clearpoint representative. It is understood that the information is provided on a confidential basis.

- ☐ **Summary of Assets** – listing of any chequing/savings accounts with current balances.
- ☐ **Summary of Debts** – listing of any loans, credit card balances etc. with balances, credit limits and current interest rate
- ☐ **Mortgage Statements** – copy of most recent statement showing term of mortgage and current balances
- ☐ **Monthly Expense Summary** – detailed summary of your household income and outgoings (a template can be emailed to you on request – sarah@clearpointbenefits.com)
- ☐ **RRSP Statements** – copy of the most recent statements showing financial institution, type of investment, contributions and current values.
- ☐ **Other Investment Statements** (TFSA, LIRA, RESP, Non-Registered etc.) – copy of the most recent statements showing financial institution, type of investment, contributions and current values.
- ☐ **Pension Statements** – details of any other pensions still held with previous employers
- ☐ **Notice of Assessment** – pages 1 & 2 of your most recent Notice of Assessment, showing your RRSP contribution room
- ☐ **CPP Statement of Contributions** (available through Service Canada – access your account online at http://www.servicecanada.gc.ca/eng/online/mysca.shtml)
- ☐ **Life Insurance Policies** – copy of any personal and/or corporate policies on your life
- ☐ **Critical Illness and/or Disability Insurance Policies** – copy of any personal and/or corporate policies