

Retirement Planning Checklist

- Income tax Notice of Assessment for the last 2 years
- Pension plan statement
- List of assets (including ownership and amount)
- List of liabilities (including ownership, amount, interest rate, and if insured for death)
- Investment statements (all institutions, holdings, amount, plan type, etc.)
- An estimate of annual expenses
- HRDC statements (for the latest estimate of CPP benefits from servicecanada.gc.ca)
- Summary of life insurance coverage (amount, beneficiary, expiration date)
- Summary of disability insurance coverage (amount, who pays premiums, expiration date)
- Any additional relevant documents