



## Creating Your Financial Plan with BMO First Appointment Checklist

Now that you've decided to work with BMO for your financial plan, your advisor will need some more information. There are some things that would be helpful for you to think about prior to your planning session. Your advisor will need to know more about your family, your dependents and your current financial situation.

### Background Information

- Dependent information (e.g., names, date of birth, relationship)
- Monthly/annual living expenses
- Income sources (e.g., employment, child support, alimony, government assistance, investment income)
- Most recent CPP / QPP pension and/or company savings plan statements and policies
- Most recent income tax return and notice of assessment (last two years, if possible)
- Insurance information (If you don't have your policy handy, bring in a summary with basic information on premiums, coverage, face value and beneficiaries)
- Any previous planning documentation from BMO or other financial institutions

### Assets

- Account statements from financial institutions including banks, credit unions, investment firms (e.g., chequing, savings, TFSA, RRSP, investment accounts)
- Estimated values of other assets (e.g., home, car, cottage)
- Loans to family members



### Liabilities

- Mortgages / outstanding loans (e.g., credit card debt, line of credit, student loans, car loans)



### Advisor Details (optional)

- Legal (Lawyer) / Tax (Accountant) / Other (Investment, Insurance Advisor and/or Planner)



### Estate (optional)

- Wills and supporting documentation
- Power of Attorney (referred to as "Mandates" in Quebec)



**Let's talk.** Call a BMO Financial Professional today at 1.888.389.8030.

