



TD Wealth for Women

Financial Checklist

An important part of achieving financial security is being organized when it comes to your financial and personal information. Having access to key contacts and financial information is important, especially during stressful times, such as in a case of emergency or in a life-changing situation. To help you organize your financial and personal information, please update the information on this checklist and store it in a safety deposit box or other secure location. This information is also helpful when meeting with a financial advisor and to use when building your net worth statement.

Key Contacts

- Financial advisor
- Lawyer
- Accountant
- Mortgage broker
- Insurance broker
- Executor
- Banker

Details/Notes

Banking

Include up-to-date statements:

- Bank accounts
- Credit Cards
- Mortgages
- Loans or Lines of Credit
- Points/Reward Programs

Details/Notes

Income

- Up-to-date pay stub
- Rental income
- Commissions
- Company stock options
- Investment income and taxable dividends
- Most recent tax return and Notice of Assessment

Details/Notes

Investments

Include the following up-to-date statements:

- Registered Retirement Savings Plan (RRSP)
- Registered Retirement Income Fund (RRIF)
- Registered Education Saving Plan (RESP) Life
- Income Fund
- Locked-In Retirement Account
- Non-registered accounts

Details/Notes

Pension and Benefits

- Old Age Security
- Canada Pension Plan
- Private Pension
- Spousal Pension
- Private healthcare benefits
- Other

Details/Notes

Insurance

Include the following up-to-date policies:

- Life Insurance
- Long-term disability
- Critical
- House/Property
- Car insurance
- Other insurance

Details/Notes

Legal

- Will (or a copy of the will)
- Living trust
- Financial Power of attorney
- Medical Power of attorney

Details/Notes

Other Important Documents

Include copies of the following:

- House deed
- Marriage Certificate
- Birth Certificates
- Passport
- Net Worth Statement
- Financial Plan

Details/Notes

Next steps

Establish a safe place to keep this document, such as a safety deposit box, in case your home is compromised. Keep in mind that this document is only useful if it contains updated information – consider reviewing and updating it annually.

For additional information on how you can work towards helping to secure your financial future, please book an appointment with an investment professional.



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