



**SPERGEL**

**Name:** \_\_\_\_\_

**Next Appointment:** \_\_\_\_\_

**PLEASE BRING THE FOLLOWING INFORMATION**

- \_\_\_\_\_ Birth Certificate or Passport
- \_\_\_\_\_ Life Insurance Policy(s)
- \_\_\_\_\_ RRSP Information (statements including account numbers, address and value)
- \_\_\_\_\_ Vehicle Ownership and Insurance (for ALL vehicles in your name)
- \_\_\_\_\_ Tax Information (proof of filing, tax assessments)
- \_\_\_\_\_ Pay stub (most recent)
- \_\_\_\_\_ All credit cards
- \_\_\_\_\_ Property Information (copy of deed, recent mortgage statement, and letter of opinion)
- \_\_\_\_\_ Investment Information (CSB, Stocks, Bonds, Shares, RESP, etc)
- \_\_\_\_\_ Corporate Information (Shares, Articles of Incorporation, most recent financial statements, Minute book, GST/PST accounts)

**Other Information:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_