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:

_____

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