

ANNUAL MEETING

Checklist

- Your financial plan
- General financial market and economic conditions
- New investment products
- Changes in lifestyle that will affect your finances
- Changes in your financial status or goals
- Your investments' performance
- Asset allocation
- Portfolio rebalancing
- Major expenditures or planned expenditures
- Budgeting
- Tax planning
- Preparations for upcoming financial deadlines (i.e. RRSP contributions, income taxes)
- Retirement planning (includes converting RRSPs to a retirement income stream)
- Life insurance
- Estate planning
- Your satisfaction with your advisor's services

Notes & Comments