Haunn Landers & Co.

Experience. Trusted advisors to accomplished entrepreneurs.

Please provide copies of the following documents for the planning process:

- ☐ **List of all Investment Account Statements**
  - ☐ Non-Registered Investments, Stocks, Bonds, Mutual Funds, Annuities, etc. (who owns, joint title, etc.)
  - ☐ RRSP's, TFSA's and any other retirement accounts
  - ☐ Deferred Compensation or other salary continuation plans
  - ☐ Royalty or other such agreements
- ☐ **Insurance Policy Details**
  - ☐ Life
  - ☐ Disability
  - ☐ Critical Illness
- ☐ **Business Documents**
  - ☐ Business Agreements (contracts for sale or purchase of property, Etc.)
  - ☐ Buy-Sell Agreements
  - ☐ Corporate By-Laws
  - ☐ Documents for businesses with ownership of each entity
- ☐ **Tax Returns & Financial Data**
  - ☐ Personal Income Tax Returns (for the previous three years)
  - ☐ Business Tax Returns (for the previous three years)
  - ☐ Personal Financial Statements
  - ☐ Business Financial Statements
- ☐ **Estate Documents**
  - ☐ Wills and all codicils
  - ☐ Powers of Attorney
  - ☐ Living Will/Health Care Power of Attorney
  - ☐ Trusts and all amendments
  - ☐ Divorce settlements
  - ☐ Pre-Nuptial and Post-Nuptial agreements
  - ☐ Real Estate holdings and title status on each
- ☐ **List of Family Members**
  - ☐ Children/Grandchildren (note whether adopted, stepchild, whether a citizen)
  - ☐ Citizenship of family members if <u>NOT</u> citizens of Canada

Notes:

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If you have any questions, or need assistance with any of these documents, please feel free to call our office at 905 821 8224.