



Simply follow this **4 STEP PROCESS** to better equip our advisory team in enabling your finances to work harder for you, making planning for retirement a less stressful experience.

STEP 1 of 4

PERSONAL INFORMATION		YOU	PARTNER
	Name		
	Date of Birth		
	Address		
	Phone #		
	Email		
	Occupation/Employer		
	Retirement Age		
	Children/DOB		

STEP 2 of 4

Understanding Your Cash Flow - the money you make minus expenses/debt payments and savings.

INCOME/EXPENSES/SAVINGS		YOU	PARTNER
	Income Before Tax		
	Approx. Yearly Expenses		
	Debt - Yearly Mortgage		
	Debt - Other		
	Savings - RRSP		
	Savings - TFSA		
	Savings - Company Pension		
	Savings - Other		





STEP 3 of 4

What You Own and What You Owe

ASSETS & LIABILITIES		YOU	PARTNER
	Value of House		
	Other Real Estate		
	Mortgage Balance		
	Other Loan Balances		
	Pension Value		
	RRSP Value		
	Investments - TFSA		
	Investments - Other		

STEP 4 of 4

For your first initial meeting, please be sure to bring in the following latest statement/ paperwork as well as this worksheet completed to the best of your ability:

FIRST MEETING CHECKLIST		YOU	PARTNER
	Latest Tax Return	<input type="checkbox"/>	<input type="checkbox"/>
	Current Notice of Assessment	<input type="checkbox"/>	<input type="checkbox"/>
	Current Pension Statement	<input type="checkbox"/>	<input type="checkbox"/>
	Current Company Benefits Booklet	<input type="checkbox"/>	<input type="checkbox"/>
	Current Investment Statements (RRSP, TFSA, Non-registered, etc)	<input type="checkbox"/>	<input type="checkbox"/>
	Life Insurance, Disability Policy or Statements	<input type="checkbox"/>	<input type="checkbox"/>
	Wills & Powers of Attorney	<input type="checkbox"/>	<input type="checkbox"/>

Should you have any difficulty filling in any of the questions provided on this worksheet, our advisors will be happy to assist you. During your initial meeting, Green Private Wealth Counsel will discuss the most essential requirement - your goals, in great detail. In order for your advisory team to help with your financial direction, you will need to provide our team with your long term and short term goal objectives. Setting, writing and monitoring measurable goals is a very important exercise that enables you to evolve to higher levels of wealth throughout your lifetime.



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