



## Document Checklist

***Please provide the following items or copies, if applicable:***

- Existing Will
- Existing Power of Attorney & Health Directives
- Marriage Contract
- Separation or Divorce Agreement
- Employment Contract
- Existing Family Trust and Alter Ego Trust Document
- Shareholder/Buy Sell Agreement
- Life Insurance, Critical Illness, Long Term Care and Disability Policies
- RRSP, Pension, DPSP, Individual Pension Plan
- RCA Trust Agreement and Statements
- Non-Registered Investment Statements, including Real-Estate Portfolio
- Corporate Financial Statements
- Latest Personal Tax Return
- Minute Book & Corporate Seal