FINANCIAL ADVISOR: 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 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, incomes taxes)
- ☐ Retirement planning (includes converting RRSPs to a retirement income stream)
- ☐ Life Insurance
- ☐ Estate planning
- ☐ Your satisfaction with your advisor's services

Notes & Comments
