



## Preparing for Your Financial Review



We look forward to reviewing your objectives, portfolio and overall financial progress at our upcoming meeting. To ensure our time together is as productive as possible, take a moment to reflect on what may have changed since our last review.

Are there any specific issues you would like to discuss? What does your current financial picture look like? Please provide any relevant details and documents prior to our meeting, using the list below as a guide.

### Since our last review, please list any:

- Changes to your financial priorities
- Significant life events (e.g. change in job or health, major purchase, the passing of a family member)


### Copies of most recent:

- Statements for any individual, non-Sun Life investment accounts (e.g. RRSP, TFSA, non-registered) and your group retirement/pension plan
- Statements for any non-Sun Life insurance policies (e.g. life, disability, critical illness insurance) whether owned individually or through a group/association plan
- Personal tax return & CRA Notice of Assessment

### Current details of:

- All real estate holdings (e.g. principal residence, cottage, investment property), including the fair market value, adjusted cost base and monthly net rental income
- Any mortgages and other debts including the interest rate, term, monthly payment and remaining balance

### Anything else that requires attention:

- Wills & Powers of Attorney
  - Beneficiary designations
  - Family member(s), friends or colleagues needing financial guidance
- 



**Monarch Financial Inc.**

(416) 366-8771 ext. 2329

Suite 201 - 1 University Avenue

Toronto ON M5J 2P1

[monarch.financial@sunlife.com](mailto:monarch.financial@sunlife.com)

[monarchadvice.ca](http://monarchadvice.ca)



\*Advisors and their corporations conduct insurance business through Sun Life Financial Distributors (Canada) Inc. Mutual fund business is done with your advisor through Sun Life Financial Investment Services (Canada) Inc.

Sun Life Assurance Company of Canada is the insurer and is a member of the Sun Life group of companies.

© Sun Life Assurance Company of Canada