



Meckelborg Financial Group Ltd.

300 – 728 Spadina Cres East

Saskatoon, SK S7K 3H2

t: (306) 933-9993

e: info@mfgltd.com

Checklist – Estate & Retirement Planning

- Most recent tax returns (T1 and notice of assessment if possible)
- Most recent financial statement (corporations only)
- Pension statements (employment, CPP)
- Investment statements (RRSP, TFSA, non-registered, RESP)
- Insurance policies
- Company benefits (booklet &/or statement)
- Wills & Power of Attorney
- List of assets & liabilities
- Completed Lifestyle Needs Questionnaire (attached)