Preparing for Your Financial Review

We look forward to reviewing your objectives, portfolio and overall financial progress at our upcoming meeting. Please 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? Using the list below as a guide, please provide any relevant details and documents prior to our meeting.

Since our last review, please list any:

- Changes to your financial priorities
- Significant life event for you or 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 group or individually-owned
- Personal tax return & CRA Notice of Assessmentnt

Current details of:

- All real estate holdings 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.
1 York Street, 27th Floor
Toronto ON M5J 0B6
(416) 366-8771 ext. 2329
monarch.financial@sunlife.com
monarchadvice.ca