



Wealth Management
Dominion Securities

myGPS™

Documents checklist

Where possible, please bring the following documents to your myGPS™ meeting.

ACCOUNT STATEMENTS

All investments accounts including:

- Securities
- Mutual Funds
- GICs
- Other

PERSONAL SPENDING

- Most recent budget summary

LIFESTYLE ASSET INFORMATION (market value and cost)

- Principal residence
- Rental real estate
- Vacation property

LIABILITIES (balance, interest rate, amortization period)

- Mortgages
- Other liabilities
- Lines of credit

INCOME AND TAXES

- Most recent pay statement
- Most recent Notice of Assessment
- Last year's tax returns

PENSION PLANS

- Most recent annual pension statement/booklet
- Recent CPP/QPP statement

LIFE INSURANCE

- Group benefit statement/booklet
- Personal policies