**Fact-Finding Checklist**

**Client Onboarding STEP 5**

Provide this checklist in hard copy to clients in the 1st Meeting who need to provide you with additional information in order for you to proceed with implementation.

**Documents We Need to Proceed**

To complete your Personal Financial Profile and move forward with assisting you, we required the following information and/or items:

**Information We Require:**

* Full Legal Name
* Address
* Birthday
* Marital Status
* Driver’s License Number
* Name, Address and Birthday of Child

**Items We Require:**

* Investment Statements for your RRSP
* Investment Statements for your TFSA
* Investment Statements for your RESP
* Investment Statements for your RRIF
* Investment Statements for your RDSP
* Driver’s License
* Other:
* Credit Card Statements

If you have any questions, please contact me directly.

Thank you,

Your Name

MFIS Title

Contact Information