

Meeting Prep Checklist

Making the Most of Your First Meeting with a Financial Advisor

When visiting a financial advisor for the first time you can improve the quality of the meeting by putting in a little homework. There is no requirement to do anything before the meeting, but the following will allow you to make the most of your time investment. Your goal should be to understand the business model of the person you're talking to, and to get the most useful and complete advice you can.

Things You Can Bring

- Details of your income
- Details of your Expenses
- Investment statements
- List of all Assets
- List of all Liabilities
- Copies of your will / Power of Attorney / Final Directive
- Life Insurance Policies
- Most recent Tax Return or Notice of Assessment

Things to Think About

- Retirement date
- Retirement lifestyle
- Does your will reflect your wishes
- Upcoming major expenses
- What are your financial concerns?

Most Importantly

Never forget that the meeting is about *you* and what you need.

This information has been prepared by White LeBlanc Wealth Planners, a Portfolio Manager for HollisWealth®. Opinions expressed in this article are those of Portfolio Manager only and do not necessarily reflect those of HollisWealth. HollisWealth® is a division of Industrial Alliance Securities Inc., a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada.

