



Kitchener
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Kitchener, ON N2C 2S9
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f. 519-742-6072

Waterloo
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Waterloo, ON N2L 6R6
t. 519-772-3050
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Cambridge
27 Water St. N.
Cambridge, ON N1R 3B2
t. 519-623-2211
f. 519-742-6072

Financial Planning Checklist

Member(s):
Appointment
Date/Time:

Branch Location:

We look forward to meeting with you to work towards achieving your financial goals. To make this process easier, please ensure you gather the below documents and additional information to bring to your appointment.

Identification

Please bring in **ONE** of the following forms of Government issued ID:

- Canadian Passport
- Canadian Travel Document
- Driver's License
- Ontario Photo Card
- Nexus
- Permanent Residency Card
- Secure Certificate of Indian Status

If you are unable to produce one of the above pieces of identification, please bring **TWO** of the following forms of identification:

- Birth Certificate
- Bring Your ID Card
- Citizenship Card
- Driver's License
- IMM 1442
- IMM 5292
- Foreign Passport
- Temporary Driver's License

Please bring all the below items:

- List of all Expenses
- House Value
- Current Notice of Assessment
- Pension Statements
- CPP and OAS Statements
- Investments Statements
- List of all Assets
- List of all Liabilities

Additional Documents:

Please bring this information to ensure a successful meeting with your ECU Representative. If you have questions about your upcoming appointment or the required documents, please contact your nearest branch.

*This checklist is for informational purposes only.