

We require the following information to properly review and update your **Personal IG Living Plan**

- Most recent Tax Return(s) (T1) & Notices(s) of Assessment
- 2 of your most recent pay stubs
- Most recent Employer Pension Plan and Benefits Statement
- Most recent Third-Party Investment Statements (i.e., held outside of IG):
 - Non-Registered
 - RRSP
 - RRIF
 - RESP
 - TFSA
 - Other
- CPP Statement, available upon request from Service Canada (optional)
- Mortgage and other debt statements

- Market Values and Purchase Prices (or Adjusted Cost Bases) for:
 - Principal Residence
 - Cabin/Cottage
 - Land – Please include annual land rent and/or oil lease incomes and expenses
 - Rental Property – Please include rental income(s) and expense(s)

- Insurance Policies and Policy Statements
- Will, Power of Attorney and Health Care Directives
- Trust Agreements
- Domestic contracts, such as: Cohabitation contract, Marriage contract, Separation Agreement

- Most recent Corporate Tax Return(s) (T2) and Financial Statements
- Organizational chart of your corporate structure
- Shareholders' or Partnership Agreements, Buy-Sell Agreements
- A description of the classes of shares of your corporations
- Adjusted Cost Base of Shares Held



FINANCES



ASSETS



OTHER



CORPORATE

Lifestyle Expense Sheet

HOUSING

Cable/Satellite	
Cell Phone	
Condo Fees	
Electricity	
Gardening	
House Cleaning	
House Insurance	
House Repairs	
Natural Gas	
Property Taxes	
Rent	
Security	
Telephone/Internet	
Water & Garbage	
Other	

Monthly Total

DAILY LIVING

Baby Sitting	
Bank Charges	
Child Activities	
Child Care	
Credit Card Fees	
Dining Out	
Dry Cleaning	
Groceries	
Pet Expenses	
Other	

Monthly Total

HEALTH RELATED

Co-Pays	
Dental	
Dependant Care	
Home Care	
Medical Insurance	
OTC Drugs	
Out-of-Pocket	
Prescriptions	
Supplements	
Vitamins	
Other	

Monthly Total

PERSONAL

Books / Music	
Clothing	
Gifts	
Personal Care	
Movies/Concerts	
Spending Money	
Sports Equipment	
Subscriptions	
Team Dues	
Other	

Monthly Total

RECREATION

Alcohol / Tobacco	
Casino / Lottery	
Memberships	
Sports Equipment	
Team Dues	
Toys / Child Gear	
Other	

Monthly Total

TRANSPORTATION

CAA Membership	
Car Washes	
Gas / Fuel	
Lease Costs	
Licenses	
Oil Changes	
Parking	
Registration	
Repairs	
Vehicle Insurance	
Other	

Monthly Total

VACATION

Air Fare	
Accommodations	
Food	
Travel Insurance	
Souvenirs	
Rental Car	
Other	

Monthly Total

VACATION PROPERTY

Boat Insurance	
Cabin Insurance	
Cabin Repairs	
Cable / Satellite	
Cell Phone	
Electricity	
Garbage & Sewer	
Natural Gas	
Property Taxes	
Quad Insurance	
Rent	
Security	
Telephone/Internet	
Other	

Monthly Total

OTHER

Charitable Donations	
Payroll Deductions	
Safety Deposit Box	
Other	

Monthly Total

