

**KITCHENER**

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[www.ecusolutions.com](http://www.ecusolutions.com)

## ***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.

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 Education Credit Union financial planning 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.