

Key Advisors / Contacts Information

Name, Address, Phone Number

Financial Planner _____

Accountant _____

Lawyer _____

Stockbroker _____

Insurance Agent(s) _____

Executor(s) _____

Attorney (holder of your power of attorney) _____

Hospital and Doctor(s) _____

Banker _____

Note: In Annex C of this workbook, you will find important phone numbers and addresses of your pension office, as well as those of the Canada Pension Plan, Quebec Pension Plan, and Old Age Security, etc.

In addition to the above, you may wish to complete the "Checklist Form" in Annex A.

DATE: _____