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HollisWealth®

INFORMATION REQUIREMENTS

- Most recent tax return
- Most recent financial statement (corporations only)
- Completed Lifestyle Needs worksheet (attached)
- Pension statements (employment, CPP)
- Investment statements (non-registered, RRSP)
- Insurance Policies
- Wills & Power of Attorney
- List of business assets (land, equipment, buildings)
- List of business liabilities (loan balances, payment amounts)