

MEETING THE FINANCIAL PLANNER

What you need to take:

- Detailed statements of goals and objectives if available
- List all dependents and beneficiaries
- Income sources
- Copies of wills of all involved
- Retirement plans
- Cash required to live
- Details on share ownership of any corporations involved
- Any trust arrangements
- Any business arrangements or agreements
- List of all assets
- List of all liabilities
- List and value of pension plans, mutual funds, etc.
- Stocks, bonds, etc.
- Existing life insurance policies
- List of private mortgages
- Details on any shareholder loans

*Adapted from Strategies for Your Family Farm Transfer
Manitoba Agricultural Training Project
Canada-Manitoba Farm Business Management Program*