



Personal Assessment Checklist

The following documentation should be brought in to your appointment or discussed with the Trustee. This will ensure that all information relevant to your financial situation is reviewed by the Trustee in the assessment of your options.

- 1 Assessment form fully completed.
- 2 All credit cards in your possession whether active or not.
- 3 All contracts/agreements; including but not limited to, separation, leases, wage assignments, court issued fines or judgments, pawn shop slips, co-signed loans, accounts receivable, etc.
- 4 Life insurance policies (entire agreement or summary from provider).
- 5 Statements for all investments (Stock, RRSP, RESP, GIC, etc.)
- 6 Vehicle registration for all vehicles in the household.
- 7 Pay stub from last pay period with year-to-date detail.
- 8 Income tax records including last completed tax return and Notice of Assessment, and T4's and other tax slips for current calendar year.
- 9 Two pieces of identification of which one must include a photo.
- 10 Setup a new bank account where you do not have any debt to or credit cards with the bank. Transfer your automatic payroll deposits and any necessary automatic payments.

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