

Yearly checkup for your financial plan

Your name

Today's date

Since last year (check all that apply)

- I've moved.
- I've changed some bill-paying arrangements.
- I have new assets or liabilities.
- I've been married, in a new union, divorced, separated or widowed.
- I have a new child, stepchild or grandchild, or I've lost a family member.
- I've changed or lost my job.
- I don't have up-to-date copies of all my important documents.
- I've changed my investments or made new ones.
- I've bought or changed an insurance policy.
- My sources of income have changed.
- My expenses have changed.
- My financial needs have changed.
- I've opened or closed a bank account.
- I've obtained a new credit card.
- I've opened or closed an online account.
- I've changed passwords for my email or other online accounts.
- I've changed one of my professional advisors.
- I've changed my will or need to change my will.
- I need to update the beneficiaries of my policies to coordinate them with my will.
- I've changed my executor (liquidator in Quebec).
- I've changed or created my power of attorney for healthcare or for finances.
- I need to name someone people can contact if they're concerned about my capacities or suspect financial exploitation.
- I've changed my funeral arrangements.
- I need to update my estate plan for the following reason. (note here)



By going through this checklist once a year, you can help keep your estate plan up to date. This can help you be confident your property will be preserved and distributed the way you want.

- If anything has changed since last year – or you want to change something now – you can work with your advisor and other professionals to adjust your plan.
- Update your inventory of assets or personal records organizer, as necessary.
- If you make significant changes, let the affected people know.

Contact your advisor to help build your estate plan and adjust it as needed.



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