



My Financial “To-Do” List

	Date Completed
√	
<input type="checkbox"/> Complete your net worth statement.	_____
<input type="checkbox"/> Calculate your living expenses.	_____
<input type="checkbox"/> Create a debt re-payment plan	_____
<input type="checkbox"/> Clearly identify deductible / non-deductible interest expense	_____
<input type="checkbox"/> Order a copy of your credit score or rating.	_____
<input type="checkbox"/> Negotiate a home owners line of credit (HOLOC).	_____
<input type="checkbox"/> “Practice” living on retirement income for 6 months (to the extent practical).	_____
<input type="checkbox"/> Create a purchasing plan for “big” toys and trips.	_____
<input type="checkbox"/> Evaluate the retirement “pot” in each spouse’s name.	_____
<input type="checkbox"/> Draft income timeline for income-splitting review.	_____
<input type="checkbox"/> Review asset mix and geographic distribution of your portfolio.	_____
<input type="checkbox"/> Develop an investment policy statement.	_____
<input type="checkbox"/> Evaluate the tax efficiency of your portfolio.	_____
<input type="checkbox"/> Order a current CPP statement of contributions.	_____
<input type="checkbox"/> Regularly re-visit retirement calculation.	_____
<input type="checkbox"/> Review and update your will.	_____
<input type="checkbox"/> Draft Enduring Power of Attorney for Health and Property	_____
<input type="checkbox"/> Review life insurance requirements.	_____