Your TD Personal Assessment Checklist

Let's figure it out

To make your TD Personal Assessment as convenient and accurate as possible, please bring the following information with you when you come in for your meeting.

Information we need	Where you can find it
☐ Your RSP savings	RSP statements
☐ Your available RSP contribution room	Income tax notice of assessment
☐ Your home value	Property tax assessment notice
☐ Your bank savings	Bank account statements or passbooks
☐ Your other savings	Investment account and pension statements
☐ Your outstanding debt	• Mortgage statement • Credit card statements • Loan or line of credit statements

This information will help ensure that we get an accurate picture of your financial situation and circumstances so that we can provide you with the appropriate advice.

My Appointment Details

Date

Time

Location

Find out where your retirement plan stands.

Ask for your TD Personal Assessment today.

Call 1-866-770-9123 or visit your local branch.

TD Canada Trust

TD Waterhouse

TDretirement.com