

# 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
<input type="checkbox"/> Your RSP savings	RSP statements
<input type="checkbox"/> Your home value	Property tax assessment notice
<input type="checkbox"/> Your bank savings	Bank account statements
<input type="checkbox"/> Your other savings	Investment account and pension statements
<input type="checkbox"/> Your outstanding debt	<ul style="list-style-type: none"><li>• Mortgage statement</li><li>• Credit card statements</li><li>• Loan or line of credit statements</li></ul>

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.

[TDretirement.com](http://TDretirement.com)

