TD Canada Trust

The best plan for the future is having a plan

Need advice on preparing for retirement?
Our advisors are prepared to help you answer the following questions:

"At what age can I retire?"

"Should I save more or pay off my mortgage prior to retirement?"

"How much income will I need for the retirement lifestyle I want?"

When you're ready to meet with an advisor, visit a TD Canada Trust branch and be sure to bring everything on the Retirement Planning Checklist. Together, we'll review your numbers and offer straightforward investment advice and solutions to help you reach your unique retirement goals.

Retirement Planning Checklist

Here is exactly what you'll need to work together with your advisor. Come in to your local branch and let's work together to help identify the next steps on your path to retirement.

- [ ] **Your RSP savings:** RSP statements
- [ ] **Your available RSP contribution room:** previous calendar year's income tax notice of assessment
- [ ] **Your home value:** property tax assessment notice
- [ ] **Your bank savings:** bank account statements
- [ ] **Your other savings:** investment account and/or pension statements
- [ ] **Your outstanding debt:** mortgage statement, credit card statements, and/or loan or line of credit statements
- [ ] **Your calculator printout:** the Retirement Savings Calculator can help you build your plan

tdcanadatrust.com/yourretirement