

FAX to: 613-695-7258 or scan documents to email: info@penneyreid.ca

Attention: Kyle Reid

FROM: _____ **DATE:** _____

PAGES: _____ *including cover page (It is not unusual for a fax to be between 15-30 pages)*

RE: *Documents required for my retirement consultation on:* _____

****ALL documents must be received 1 week prior to consultation.****

<u>My fax includes the following documents (please "X"):</u>	Myself	Partner / Spouse
<input checked="" type="checkbox"/> Pension Statement <small>A copy of your annual Pension and Benefits Statement (booklet), or "Pension calculation" from your compensation advisor, or Online Pension calculator estimate (note that data for Online estimates must be entered by participant - above documentation is preferred for accuracy).</small>	_____	_____
<input checked="" type="checkbox"/> Most recent Pay Stub	_____	_____
<input checked="" type="checkbox"/> All pages of most recent Investment Statement(s) <small>(RRSP/LIF/RRIF/LIRA/Non-registered etc.) which includes a detailed list of mutual funds/stocks/guaranteed investment certificates/bonds.</small>	_____	_____
<input checked="" type="checkbox"/> Notice of Assessment <small>Please include the summary page (full page), as well as the half page that indicates your available RRSP contribution room as well as your pension adjustment.</small>	_____	_____
<input checked="" type="checkbox"/> Outline of outstanding debts	_____	_____
<input checked="" type="checkbox"/> List of additional questions	_____	_____

Please send documentation for both you and your partner/spouse (if applicable). Pension information is NOT limited to Government Pensions.

Tel:613-695-7250

Fax:613-695-7258

e-mail: info@penneyreid.ca



**Directions to our office:
302 – 1900 City Park Drive**

- Take the 174 to the Blair Exit
- Follow Blair North
- Turn left onto Ogilvie Road
- Turn left onto City Park Drive

For map visit our website: www.penneyreid.ca