

Enrollment Checklist



Required

- Complete the online application form prior to our meeting. You can access the form via this [link](#) or by visiting www.carolplaisier.com/grouprrspapp
- A picture of your driver's license
- A picture of another form of ID showing your birthdate or address (passport, utility bill, phone bill, insurance paperwork, etc.)
- Picture or scan of a void cheque (if you will be wanting to make additional contributions)
- Please include a cell phone number for any authentication codes that will be sent during the process for e-signatures and confirmations.

Things to think about before the meeting

- Beneficiary information (whom would you like to have these funds if something happens to you?)
- Do you regularly make RRSP contributions elsewhere? If so, will this plan impact the total annual RRSP contributions you can make? (RRSP contribution limits)
- Do you have any other investment accounts, insurance or other financial products that you would like to review with a financial advisor?
- Would you like to consolidate any other RRSP accounts that you have at other institutions into this account?
- For general information on how RRSPs work, please visit this [link](#) or <https://iaprivatewealth.ca/insights/boost-your-retirement-savings-with-an-rrsp>