

## New Financial Plan Checklist

This checklist is intended to remind you of various key points to review when either creating a new **Client**, or creating a new **Scenario** for an existing client in Snap Projections. Please feel free to add or remove steps from this checklist as required. There will be additional things to take into consideration beyond this simplified checklist, but this will ensure that you’ve got the basics covered!

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| Checklist | |
|  | Enter or modify **Client Details** (add a **Spouse** if required). |
|  | Validate **Default Rates of Return** in the **Scenario Setup -> General page.** |
|  | Modify the **Expenses,** **Income**, **Assets** (and **Edit Contribution Room**), and **Debts**. |
|  | Enter the **Base Expenses** (on the **Combined** page for couples). |
|  | Enter the savings/withdrawals under the **Contribution** columns on the **Planning Page**. |
|  | Review and modify the CPP and OAS information under **Gov’t Benefits**. |
|  | Change RRSP and LIRA conversion dates under **Scenario Setup -> Assets -> RRSP/RRIF or DCPP/LIRA/LIF**. |
|  | Add any additional details as required (**Insurance**, **Corporations**, **Education**, Etc.) |

Happy planning!