

## New Financial Plan Checklist

This checklist is intended to remind you of various key points to review when creating a new scenario 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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| Client | |  |
| Scenario | |  |
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|  | Enter or modify **Client Details** (add a **Spouse** if required) in **Scenario Setup -> Client**. | |
|  | Validate the **Inflation Rates** and **Rates of Return** in **Scenario Setup -> General**. (If using the default rates of return, remember to subtract fees from the default values.) | |
|  | Enter **Base Expenses** and **Additional Expenses** in **Scenario Setup -> Expenses**, and enter **Incomes** in **Scenario Setup -> Incomes** (use annual amounts). | |
|  | Enter **Assets** in **Scenario Setup -> Assets** and enter **Debts** in **Scenario Setup -> Debts** (use start of the year values). | |
|  | Change **RRSP** and **LIRA conversion age** and edit **contribution room** under **Scenario Setup -> Assets -> RRSP/RRIF, TFSA** and **DCPP/LIRA/LIF** tabs. | |
|  | Enter any contributions (withdrawals) under the **Contribution (Withdrawal)** column on the individual’s view of the **Planning Page** (not combined view). | |
|  | Review and modify the **CPP/QPP** and **OAS** information under **Scenario Setup -> Gov’t Benefits**. | |
|  | Add any additional details as required (**Insurance**, **Corporations**, **Education**, etc.) | |
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Happy planning!