

# ARE YOU WELL PROTECTED?

Be prepared for the unexpected. Leave nothing to chance when protecting your finances.



## Checklist<sup>1</sup>

### Insurance

Be well insured

- Life insurance
- Disability/income insurance
- Critical illness insurance
- Home insurance
- Auto insurance

### Estate

Plan your estate

- Determine your goals (heirs, last wishes, etc.)
- Gather your official documents and prepare an estate summary (marriage contract, life insurance policies, investment statements, etc.)
- Prepare your will with a professional
- Designate your executor/liquidator
- Designate your heirs
- Optimize your tax planning (review your tax strategies)
- Plan your funeral arrangements
- Plan your final moments (protection mandate, advance medical directives, etc.)

### Financial Management

Think about your powers of attorney

- Choose a proxy
- Gather legal documents

For more information and practical tips, log in to My Client Space ([ia.ca/myaccount](https://ia.ca/myaccount)) and go to the "Protect your finances" section in the Financial Wellness Zone.

<sup>1</sup>The information in this checklist is not a substitute for professional financial, tax or legal advice.