BASIC INFORMATION CHECKLIST

1.	Information re: deceased	(a) Name (b) Date of birth (c) Type of accident (d) Dates of accident and death
2.	Background information	Purpose of report, date report required, status of litigation, and anticipated trial commencement/mediation date
3.	Deceased's former employment/self-employment information	(a) Name of employer/business and date of hire/business commencement (b) Position and functions prior to death (c) Details re: deceased's career aspirations and retirement plans
4.	Details re: surviving spouse, minor children and/or other dependents	Names and dates of birth Income and employment information re: surviving spouse Reasons why older children or others are dependent
5.	Documentation/ other information (If available and relevant)	Personal tax returns, T4 slips and Notices of Assessment (ideally for 5 years prior to the date of death)
		In the case of self-employment, corporate financial statements and tax returns (ideally for 5 years prior to the date of death)
		Curriculum Vitae (résumé) and/or details re: deceased's education, employment and earnings history
		Familial/ replacement services and care needs/cost report
		Employee benefits booklet and/or annual pension statement
		Examination for discovery transcripts
		Other relevant reports and documentation (employer paid employee benefit details, collective agreement, reduced life expectancy estimate, reports to be responded to and/or critiqued, parental and sibling education information in the case of injured minors etc.)
6.	Client contact information (if appropriate)	Phone, cell and email
7.	Sundry relevant information and/or fact specific considerations	Provide explanation

The above noted basic checklist, for either Plaintiff or Defense assignments, is not exhaustive and additional specific information may be required. Feel free to contact our office should additional explanation or clarification be required.



THE POWER OF BEING UNDERSTOOD AUDIT | TAX | CONSULTING

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM Canada LLP and RSM Canada Consulting LP, and their affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed. RSM Canada LLP is a limited liability partnership that provides public accounting services and is the Canadian member firm of RSM International, a global network of independent audit, tax and consulting firms. RSM Canada Consulting LP is a limited partnership that provides consulting services and is an affiliate of RSM US LLP, a member firm of RSM International. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and ont those of any other party. Visit remenadada.com/aboutus for more information regarding RSM Canada and RSM International. RSM® and the RSM logo are registered trademarks of RSM International Association, used under licence. The power of being understood® is a registered trademark of RSM US LLP, used under licence.

BASIC INFORMATION CHECKLIST

Plaintiff's personal information	(a) Name of plaintiff (b) Date of birth (c) Date and type of accident
2. Background information	Purpose of report, date report required, status of litigation, and anticipated trial commencement/mediation date
Plaintiff's employment/self- employment information	(a) Name of employer/business and date of hire/business commencement (b) Position and functions at date of accident (c) Details re: career prospects/aspirations and retirement plans (d) Details re: post-accident work absences
Collateral benefits received	Details re: short term disability, long term disability, CPP disability and Income Replacement Benefits applied for and received (include relevant correspondence)
	Personal tax returns, T4 slips and Notices Of Assessment (ideally for 5 years prior to the accident)
	If plaintiff was self-employed, corporate financial statements and tax returns (ideally for 5 years prior to the accident)
	Curriculum Vitae (résumé) and/or details re: education, employment and earnings history
Documentation/ other information	Future Care needs/cost report
(if available and relevant)	Copy of relevant correspondence including additional information requests by insurer or their representatives
resevanty	Employee benefits booklet and/or annual pension statement
	Examination for discovery transcripts
	Other relevant reports and documentation (employer paid employee benefit details, collective agreement, reduced life expectancy estimate, reports to be responded to and/or critiqued etc.)
Client contact information (if appropriate)	Name, phone, cell and email
7. Sundry relevant information and/or fact specific considerations	Provide explanation

The above noted basic checklist, for either Plaintiff or Defense assignments, is not exhaustive and additional specific information may be required. Feel free to contact our office should additional explanation or clarification be required.



This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM Canada LLP and RSM Canada Consulting LP, and their affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed. RSM Canada LLP is a limited liability partnership that provides public accounting services and is the Canadian member firm of RSM International, a global network of independent audit, tax and consulting firms. RSM Canada Consulting LP is a limited partnership that provides consulting services and is an affiliate of RSM US LLP, a member firm of RSM International. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and ont those of any other party. Visit remenadada.com/aboutus for more information regarding RSM Canada and RSM International. RSM® and the RSM logo are registered trademarks of RSM International Association, used under licence. The power of being understood® is a registered trademark of RSM US LLP, used under licence.