



## Financial Document Collection- Wright, Shonda

Please complete the below by uploading all applicable documents. If a document does not apply to you, please skip the request and move to the next one. Once the documents have been uploaded into SideDrawer they will be available for you to access and share with others:

- ✓ Portfolio Statement  
**Investments**

#Wright, Shonda Portfolio Statement

*For any ACCOUNTS and ASSETS not in your Portfolio statement(s), please upload them below*

### Accounts

Chequing / Savings  
Account

**Personal Finances**

RRSP / RIF

**Investments**

TFSA

**Investments**

Non Registered Account  
**Investments**

Other Accounts  
**Personal Finances**

✓  I have uploaded all applicable documents

**Assets**

✓ Property Purchase / Sale  
**Real Estate**

#Wright, Shonda Property Purchase / Sale

Cryptocurrency  
**Investments**

✓ Other Assets  
**Personal Finances**

#Wright, Shonda Other Assets

**Liabilities**

✓ Mortgage  
**Real Estate**

#Wright, Shonda Mortgage

Credit Card Debt  
**Personal Finances**

Home Equity Line of  
Credit  
**Real Estate**

✓ Line of Credit  
**Personal Finances**

#Wright, Shonda Line of Credit

Other Liabilities  
**Personal Finances**

✓  I have uploaded all applicable documents