



Preparing for Your First Planning Session

In order to get the most out of your First Planning Session and pave the way for a smooth, hassle-free relocation, we request that you complete 2 steps **before** your First Planning Session:

1. **Prepare and send the documents listed below;**
2. **Read the applicable sections of the *NJC IRP Directive*;**

1. Prepare and send the documents listed below

At least **2 – 4 business days before** your scheduled First Planning Session, please submit the required documents listed below:

- Listing Agreement (contract you have signed with your Realtor®)
- Copy of Deed (to confirm ownership)
- Existing Survey/Certificate of Location or Real Property Report (to confirm lot size)
- Original Agreement of Purchase (required only if you expect a loss on the sale of your current residence)
- Confirmation of Mortgage Portability (Mortgage Details), form to be completed by your financial institution
- If you have accepted an offer on your current residence, please provide us with the accepted Agreement of Sale Agreement of Sale
- Void cheque or other official document verifying banking information (Please note that funds cannot be deposited to a credit card or line of credit accounts – hand written account/transit numbers are not acceptable)

All forms are available on your [Secure Website](#) unless otherwise noted. Once completed, you can upload forms and documents directly to your file using the Document Management tool on the [Secure Website](#).

2. Read the applicable sections of the *NJC IRP Directive*

We strongly recommend that you read all of the sections you identify in Section 1 of your [Relocation Checklist](#) (available on the public website at www.irp-pri.com under the [Where to Start](#) section). Your Advisor will discuss these items with you further during your Planning Sessions.