

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 3 steps **before** your First Planning Session:

1. **Prepare and send the documents listed below;**
2. **Read the applicable sections of the [RCMP IRP Policy](#); and,**
3. **Read the applicable sections of the [It's Your Move](#) guide.**

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:

- Copy of document confirming ownership at origin (such as Certificate of Title, Copy of Title, Certification of Registered owner or Deed)
- Vehicle license plate numbers and province of registration (for all vehicles and trailers)
- Listing Agreement (contract you have signed with your Realtor)
- 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
- 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](#), fax them to your Advisor or drop them off at your local BGRS office. The coordinates for your Advisor are available on the [Secure Website](#) under the Contact Us tab.

Read the applicable sections of the [RCMP IRP Policy](#)

We strongly recommend that you read all of the sections you identify on your Relocation Checklist, at the time of your online registration. This document is available on your [Secure Website](#) under the “Home” tab. Click on the “?” icon for policy details. Your Advisor will discuss these items with you further during your Planning Sessions.

Read the applicable sections of the [It's Your Move](#) guide

BGRS has published a guide called [It's Your Move](#) with tips, tools and examples to assist you and your family in preparing for this important milestone. Before your First Planning Session, we recommend you read the following sections available under the [Policies & Directives](#) section:

- Planning Your Move
- Sell Smart
- Rent Smart