

McKeating Actuarial Services, Inc.

www.mckeating-actuarial.com

Personal Injury Economic Loss Checklist

We are accustomed to working with incomplete or imperfect information. Please start by sending the information that is **easily available**. We'll review it and advise if anything further is required. In general, here's what's needed:

General Information

- Name of plaintiff and defendant (for conflict of interest check)
- Date of birth of plaintiff
- Date of incident that led to the injury
- Cause of injury (MVA, medical malpractice, etc.)
- Preferred valuation date (date of trial, mediation, or settlement conference; or is an arbitrary date acceptable?)
- Family information (Is the plaintiff married? Names and dates of birth of the spouse and any dependent children?)
- Which heads of damages are being claimed? Lost earnings? Pension? Care costs? Valuable household services? Investment Management Expenses? Past and future, or future only? Include provision for income tax gross-up?

Pre-incident Earnings Information

- Income Tax Summaries, T4s, or other earnings data for the 4-5 years prior to the incident (including the year of the incident)
- If the plaintiff was a student at the time of the incident, information about grades, career aspirations, etc.

Post-incident Earnings Information

- Income Tax Summaries, T4s, or other earnings data for all years from the date of the incident to the current date (include information about Section B benefits, CPP disability benefits, Workers' Compensation, EI, employer-sponsored LTD benefits, etc. as applicable)
- What is your position concerning the plaintiff's ability to work in the future?
- Has the incident affected the plaintiff's expected retirement date?

Pension and Benefits Information

- Most recent December 31 annual pension statement, plus last statement received prior to the incident
- Did the plaintiff participate in a benefits program (health, dental, etc.) prior to the accident?

Reports from Other Experts

- Life care plan, functional capacity evaluation, lost valuable services assessment, vocational assessment, medical opinion concerning mortality and/or disability, etc. (please provide ONLY medical reports that are relevant to the pecuniary damage valuation)

Questions? Please contact us:

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