

YOUR FREE FINANCIAL HEALTH CHECK

People often feel shy about their personal financial situation or feel they need to be further ahead financially before talking to a financial advisor and preparing a plan. The reality is that most put it off far too long and miss opportunities to build financial independence for themselves and their families. Complete our quick financial health check list below to see where you stand today.

Yes No

- Have you set an age you'd like to retire (or achieve financial independence)?
- Do you know how much you'll need to save to live comfortably for up to 30 years in retirement?
- Is your current investment portfolio set up to match this plan and allow your money to outlive you?
- Do you have a plan if your partner loses their job/income?
- Do you intend to help family members with their education expenses?
- Are you confident about your money and your plan during market volatility?

42%

of Canadians said money is their greatest stress

87%

of Canadians wish they had made better financial decisions earlier in life.

Gain tremendous confidence from knowing you are making smart choices with your money but putting a comprehensive plan in place. If you checked two or more 'NO' boxes from the list above, then it's time to review your financial plan with a trusted advisor.

Creating a long-term relationship with an advisor allows you to manage the risks and needs of your family as they evolve over time. Our trusted process enables you to be crystal clear about those things in life that are most important to you. The truth is, we've likely seen many situations like yours and we're well equipped to help you.



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