

Savings and Retirement

READY TO PLAN?

Determine your financial objectives by discovering your needs



The current situation requires you to rethink the way you save and to adapt your life projects accordingly. Identify your needs in the list below and let us help you protect your income and plan out your projects.

My short-term needs	Yes	No	I don't know
1) Create an emergency fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2) Open a TFSA for special projects that require cash quickly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3) Meet my current financial obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4) Pay off my debts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

My long-term needs	Yes	No	I don't know
1) Start/continue with retirement savings plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2) Save for childrens'/grandchildrens' education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3) Protect my assets with the right insurance product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4) Start estate planning discussions with my parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Let one of our financial security advisors help you identify your objectives and put in place a plan that is well thought out and adapted to your situation!



INVESTED IN YOU.