

## GETTING GOOD ADVICE

# Financial priority planner

Use this planner to assess your current financial priorities. Your advisor can devise the appropriate strategies to help you balance your priorities while making progress toward your goals.

Check the priorities that apply to you; then rank them in order of importance from most important to least important.

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|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <input type="checkbox"/> Paying off debts .....                              | <input type="checkbox"/> Owning your own home .....                                     | <input type="checkbox"/> Ensuring that you have enough money for retirement .....       |
| <input type="checkbox"/> Owning your own home .....                          | <input type="checkbox"/> Paying off other debts .....                                   | <input type="checkbox"/> Acquiring a vacation property or other significant asset ..... |
| <input type="checkbox"/> Saving for a child's education .....                | <input type="checkbox"/> Saving for a child's education .....                           | <input type="checkbox"/> Reducing current income taxes .....                            |
| <input type="checkbox"/> Providing financial security for dependants .....   | <input type="checkbox"/> Providing financial security for dependants .....              | <input type="checkbox"/> Maximizing contributions to an RRSP .....                      |
| <input type="checkbox"/> Ensuring you have enough money for retirement ..... | <input type="checkbox"/> Providing care for a dependent relative .....                  | <input type="checkbox"/> Creating an estate plan .....                                  |
| <input type="checkbox"/> Reducing current income taxes .....                 | <input type="checkbox"/> Ensuring that you have enough money for retirement .....       | <input type="checkbox"/> Preserving your assets .....                                   |
| <input type="checkbox"/> Maximizing RRSP contributions .....                 | <input type="checkbox"/> Reducing current income taxes .....                            | <input type="checkbox"/> Achieving financial independence .....                         |
| <input type="checkbox"/> Other .....                                         | <input type="checkbox"/> Acquiring a vacation property or other significant asset ..... | <input type="checkbox"/> Paying off your mortgage and other debts .....                 |
|                                                                              | <input type="checkbox"/> Maximizing contributions to an RRSP .....                      | <input type="checkbox"/> Saving for a child's education .....                           |
|                                                                              | <input type="checkbox"/> Creating an estate plan .....                                  | <input type="checkbox"/> Providing financial security for dependants .....              |
|                                                                              | <input type="checkbox"/> Other .....                                                    | <input type="checkbox"/> Providing care for a dependent relative .....                  |
|                                                                              |                                                                                         | <input type="checkbox"/> Other .....                                                    |