

# Priorities *YourStyle*



## WHAT ARE YOUR PRIORITIES?

*Your...*

### LIFESTYLE

- Finance lifestyle
- Do retirement assessment
- Fulfil income needs
- Protect savings
- Make money grow
- Finance significant purchase

### FAMILY

- Protect family
- Finance children's education
- Finance vacation
- Assist parents

### HOME/PROPERTY

- Finance home
- Renovate home
- Purchase cottage/vacation property
- Finance income property
- Protect home or property

### CAREER/BUSINESS

- Protect ability to work
- Provide business succession
- Protect family
- Protect assets
- Take sabbatical

### TAXES

- Pay less tax
- Generate tax refunds
- Choose tax-efficient investments

### LEGACY

- Protect loved ones
- Gift loved ones
- Pass on assets
- Plan charitable giving

### ANXIETIES

- Not having enough money
- Losing capital
- Starting plan too late
- Market ups and downs

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What's  
important  
to you