Do you have a plan?

Canaccord Genuity
Wealth Management

Do you know how much you need to save for retirement? Is your investment strategy aligned to your goals? Are you effectively minimizing tax? Do you know what kind of financial legacy you will leave for your family?

If you answered no to any of the above, you may benefit from a plan. Creating a financial plan allows you to take control over your financial and emotional wellbeing. It can deliver peace of mind and drive meaningful action to move you towards your goals.

A comprehensive financial plan should account for:

- Strategic investments
- Retirement goals
- Scheduled savings
- Planning for insurance needs
- Major purchases
- Education costs
- Emergencies

THE VALUE OF A FINANCIAL PLAN

According to the Financial Planning Standards Council (FPSC), 81% of Canadians with comprehensive financial plans feel on track with their financial affairs, versus 73% with limited planning and 44% with no planning.†

In addition to giving you peace of mind, a comprehensive financial plan allows you to:

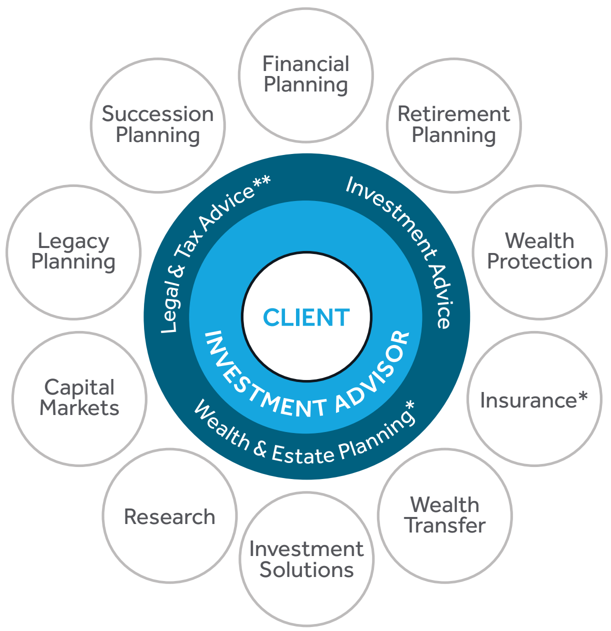
- **Clarify your goals** – You may have some sense of what you want to achieve for yourself and your family, but a comprehensive plan can help to make these financial objectives actionable and measurable, allowing you to track your progress in a meaningful way.
- **Gain a comprehensive view** – A cohesive plan gives you a consolidated view of your financial life, allowing for greater control and more efficiency.
- **Identify opportunities** – With the full view of your financial picture, your advisor can work with you to mitigate taxes and find efficiencies within your plan.
- **Follow detailed steps toward your goals** – A financial plan provides you with a detailed road map, with logical steps to follow, to bring your objectives within reach. Along the way, your Investment Advisor will work with you and your network of professionals to implement your plan of action.

†The Value of Financial Planning, FPSC and Financial Planning Foundation We can help

WE CAN HELP

Investing the time in developing a financial plan can pay dividends over your lifetime and for the next generation of your family – and we can make it easy.

Your Canaccord Genuity Wealth Management Investment Advisor draws on a team of financial planning, insurance, tax and estate planning experts to provide you with coordinated planning across several key areas.



*Offered through Canaccord Genuity Wealth & Estate Planning Services Ltd.
**Offered through external relationships

OUR PLANNING PROCESS

Here is what you can expect when you work with your Investment Advisor and a Canaccord Genuity Wealth & Estate Planning Specialist to develop your plan:

Step 1
Discovery Meeting

At our initial meeting, we work with you to understand what is important to you and your family. We undertake a detailed discovery process to gather all the necessary information about you, your family, and your financial goals, concerns and questions.

Step 2
Presentation

Using the information from our discovery meeting, we put together your initial financial plan with recommendations that we can then use as a roadmap. In this meeting, we present the plan to you, evaluate different scenarios and determine which path works best for you. Sometimes this step can take a few meetings as we evaluate different financial scenarios to determine the best course of action for you.

Step 3
Implementation

Once your plan is in place, we work with your Investment Advisor and the appropriate professionals – like your accountants and lawyers – to help implement the recommendations in the plan and ensure that all of the appropriate steps are taken.

Step 4
Monitoring

Financial planning is not a one-time event; it is an ongoing, evolving process that should be updated and reviewed regularly. Together, we continue to monitor your financial plan each year, and to revise it as your financial and family circumstances change.

If you and your family can benefit from a comprehensive financial plan to bring your goals within reach, contact your Canaccord Genuity Wealth Management Investment Advisor today.