

What's Important to You?

Your financial decisions should not be made in isolation, but rather should move you closer to your objectives. What are your Great Goals in Life, and how can we help you achieve them?

What are your investment objectives?		
<input type="checkbox"/> Maximize RRSPs	<input type="checkbox"/> Have a Financial Reserve	<input type="checkbox"/> Savings for House Down-Payment
<input type="checkbox"/> Learn to Invest	<input type="checkbox"/> Pay Down Mortgage	<input type="checkbox"/> Assure My Family's Income
<input type="checkbox"/> Emergency	<input type="checkbox"/> Insure My Mortgage	<input type="checkbox"/> Savings for Vehicles / Other
<input type="checkbox"/> Travel and Vacation	<input type="checkbox"/> Beat the Cost of Living	<input type="checkbox"/> Preserving Estate for Heirs
<input type="checkbox"/> Retire Early	<input type="checkbox"/> Have a Business Reserve	<input type="checkbox"/> Buy a Second Home or Cottage
<input type="checkbox"/> Retire Comfortably	<input type="checkbox"/> Insure my business	<input type="checkbox"/> Review My Will and Estate
<input type="checkbox"/> Other	<input type="checkbox"/> Reduce Income Tax	<input type="checkbox"/> Learn How to Manage My Money

What are your investment fears?			
Living with Debt	<input type="checkbox"/>	Dying with Debt	<input type="checkbox"/>
Running out of money in retirement	<input type="checkbox"/>	Not being able to save enough money	<input type="checkbox"/>
What would happen if I die young	<input type="checkbox"/>	What would happen if I was sick	<input type="checkbox"/>
Being dependant on my children	<input type="checkbox"/>	What would happen if I was injured . .	<input type="checkbox"/>
Elderly parents being dependant on me	<input type="checkbox"/>	Other:	<input type="checkbox"/>

Are there any areas that you would be adverse to or uncomfortable investing in?