

## GETTING GOOD ADVICE

Working with your advisor to save for retirement

# 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.

### Years To Retirement – More than 30

- Paying off debts .....
- Owning your own home .....
- Saving for a child's education .....
- Providing financial security for dependants .....
- Ensuring you have enough money for retirement .....
- Reducing current income taxes .....
- Maximizing RRSP contributions .....
- Other .....

### Year to Retirement – Less than 30, but more than 10

- Owning your own home .....
- Paying off other debts .....
- Saving for a child's education .....
- Providing financial security for dependants .....
- Providing care for a dependent relative .....
- Ensuring that you have enough money for retirement .....
- Reducing current income taxes .....
- Acquiring a vacation property or other significant asset .....
- Maximizing contributions to an RRSP .....
- Creating an estate plan .....
- Other .....

### Years to Retirement – Less than 10

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