

Working with your advisor to save for education

Financial priority planner

Check the financial priorities that apply to you; then rank them in order of importance from most to least important. With this information, your advisor can help devise the appropriate strategies to help you balance your priorities while making progress toward your goals.

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