BEST PLAN
INSURANCE & FINANCIAL STRATEGIES

YOUR FINANCIAL PLANNING CHECKLIST:

To see how we can help you reach your goals, let us know what services you are interested in. As a courtesy, we will provide you with a complimentary consultation in addition to a copy of Ralph's new book.

Fill in and fax this form to 905-709-1900, or mail it to the address above.
Personal:
__Financial plan review - goal setting and establishing priorities
__Cash flow analysis and budgeting
__Tax planning
__Inheritance planning,
__Risk tolerance assessment
__New home ownership, mortgage comparisons
__Debt reduction strategies
__Prepare/update Wills and Powers of attorney (property & personal care)
__Review of insurance needs (including life, critical illness, disability and long term care)
__Investments
Other ______________________________________

Family:
__Referrals to other professionals (Accountants/Lawyers etc.)
__New family/having a baby
__Education Plans, SIN for children and apply for RESP, 20% Gov't grant
__Planning for the Elderly
__Important information for new Canadians
__Starting over (separation/divorce)
__Change of beneficiaries
__Planning for family members with special needs
Other ______________________________________

Retirement & Estate Planning:
__Income splitting opportunities
__Pension entitlement analysis
__Retirement Income streams
__Joint ownership of property
__Disposition of property
__Joint Partner, Alter Ego and Family Trusts
__Charity/gifting strategies
Other ______________________________________

Business:
__New business structure- (corporation, proprietorship, partnership)
__Creating/reviewing business plans
__Buy/Sell agreements
__Tax deferral/sheltering and creditor protection issues.
__Keyman life, critical illness and disability insurance
__Executive retirement strategies, Business succession
Other ______________________________________

Request for additional information:

Name____
Address________________________City ________________Postal Code:______________
Phone (day) (___)____________________(evening)_(____)_____________________
Email ____________________________________