

List of Items I Own

These services require all parties to participate and can be held at your planner's office at your convenience. I welcome your response to take action and book that visit and find out how healthy and wealthy you may become. Now many of you have access to your accounts through the web site on a day to day basis. Call me if you cannot log on. Take time now to tick off all the programs that you have on this list that comprise your overall financial plan. Bring in your list and copies of the plans for review for a private meeting under no obligation to check the health and wealth of your investment and secured insurance planning.

| | Yes | No |
|---|-----|----|
| Property | | |
| Business Owner | | |
| Group Life | | |
| Group Disability Coverage | | |
| Health Plan Group | | |
| Group Pension Plan | | |
| Private Pension Plan (i.e. Blue Cross) | | |
| Private Long Term Disability | | |
| Term Insurance | | |
| Universal Life Insurance | | |
| Whole Life | | |
| Critical Illness Insurance | | |
| RRSP's | | |
| RESP | | |
| Investments other than pension | | |
| Leveraged Investments | | |
| Deferred Compensation Plan | | |
| Mutual Fund Portfolio | | |
| Segregated Funds | | |
| Guaranteed Investment Funds | | |
| Tax Savings funds for your estate | | |
| Tax Advantaged Savings outside of RRSP | | |
| Pension Maximization Plan | | |

Quite the list, but all of the above need reviewing now and then. I look forward to your [email](#) or telephone call (228-0901).