Dedicated Financial Solutions

Choose your path, change your future.

Is it worth the effort to develop a financial plan? YES!

Features	Benefits	Value to You
☑ Review Finances	Understand your financial position throughout your lifetime and for your legacy.	Live with greater confidence and a positive outlook for the future.
☑ Goal Setting Short—Medium—Long Term	Identify attainable goals and develop a plan to achieve them.	Be able to focus on the things that are important to you in your life.
☑ Direction and Purpose	Know where you are headed and know why.	Always financially ready for both the predictable and any emergency needs.
☑ Tax Planning	Use every tax advantage available and reduce the total amount of taxes you are required to pay.	Save more towards your goals. Your money works for you and stays with you. Keep more of the money you make.
☑ Cash Flow Planning	Get a clear picture of your spending profile so you can manage any particular habits.	Be prepared for large expenses, manage your credit, structure your savings.
☑ Retirement Planning	Forecast your retirement expenses and income now - know how much you will need to live comfortably.	Achieve financial security for your retirement years.
☑ Investment Planning	Understand your investments. Learn which ones are right for you.	Preserve your capital, grow your wealth.
☑ Estate Planning	Prepare ahead for your beneficiaries and minimize the taxes against your estate.	You will have peace of mind knowing your estate will be settled according to your wishes.
☑ Central Management	Streamlined and simple to understand, with one source for reporting.	Someone will monitor your financial portfolio and will discuss it with you as needed.
☑ Insurance Needs	Determine exactly what you need and eliminate anything unnecessary.	Get only the protection you really need.

Complimentary Financial Plans or Portfolio Reviews. Call today for an appointment.

Janet Baccarani, BSc, MBA, C.A., CFP, FMA
Senior Financial Advisor and Certified Financial Planner

Jennifer Black, BSEd, FMA
Financial Advisor and Life Insurance Advisor

Manulife Securities Incorporated, Manulife Securities Insurance Inc.
200—3 Robert Speck Parkway, Mississauga, ON, L4Z 2G5, PH: 905-896-9060 Toll Free: 1-877-553-3305 Fax: 905-366-0990

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INCORPORATED
INSURANCE INC.