

Five key financial security questions

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1. If you accumulate as many net assets in the next five years as you did in the last five years, will you be satisfied with your progress?

- Yes
- No
- I don't know. Let's discuss.

2. Is the difference between what you own and what you owe:

- Getting larger
- Getting smaller
- Staying the same
- I don't know, please help me to identify the difference.

3. How many weeks of your typical month in retirement are fully funded by your current financial security plan (based on your date of retirement until end of your projected life expectancy):

- First week only
- Two weeks
- Three weeks
- All four weeks
- I don't know, please help me find out.

4. Does your current life insurance pay you immediately to stay at home on diagnosis of critical illness – or would you have to go to work while critically ill?

- Pays me to stay at home while recovering
- I would still have to go to work
- I have no idea. Please evaluate my situation with no obligation

5. Based on your current financial security plan, for how many of your children will you be able to fund post-secondary education:

- One child
- Two children
- Three children
- All of our children
- I have no idea. Please help me to determine at no expense.