

Juggling is for circus performers, not your portfolio management.



Did you invest in mutual funds this RSP season? Were you so rushed, you're not sure how they're invested; let alone how they fit in with your other investments or your long-term goals?

Life is what happens while you're making plans. You're busy with your work, your family, and your friends. Although you may have the best intentions, your financial plan is probably one of many "projects" you've been meaning to get to, but you keep putting it off because it is neither your expertise, nor your interest. The options are countless, and you don't have time to do the research, or keep up with ongoing changes in the economy, the mutual fund and investments industry, or tax laws.

Take some time out this month and let me prepare a comprehensive financial plan for you and your family that will provide for all the contingencies – death or disability, post-secondary education, retirement, estate planning, income taxes and cashflow debt reduction. Comprehensive plans including mutual funds give my clients the peace of mind that they are on the right track in planning for the future, which allows them to more fully enjoy their today.

My name is Melissa DeBrouwer, and I'd be happy to design that financial plan for you. After the plan has been developed, we will decide which investment vehicle will work for you, whether it is mutual funds, segregated funds, or a GIC. Once the plan is in place, we will review as needed, so you can get back to all of the other projects in your life that you are juggling. Give Jackie or Alison a call at 875-1000 and book your appointment soon. I look forward to meeting you.



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