



2023 Sample Financial Vision



My partner and I are both planning to retire in the summer of 2023. We are excited for this new chapter of our lives.



I know that it is important as we approach retirement to review our estate planning documents, and ensure that these still reflect our wishes.



We are looking forward to engaging in more travel as we have more free time due to retirement. Some bucket-list destinations are Japan, Korea, South America & Europe



I am aware that we can potentially start our own foundation using Benefaction, allowing for funds to be allocated to the charity of our choosing while providing a tax benefit to the corporation and myself.