



CIBC
Wood Gundy

The Meyer Financial Group



The Value Of Financial Planning

Can you take the vacation you want every year?

Will you be able to retire and maintain your existing lifestyle?

Would the people you care about be looked after financially if anything should happen to you?

Statistics prove that people with a comprehensive financial planning are more likely to answer “yes” to these questions!

Financial planning is a process that determines how you can best meet your financial goals. It takes into account all relevant aspects of your financial situation, identifies and analyzes the interrelationships among sometimes conflicting objectives.

Canadians who engage in financial planning are better off than those who don't. Consider these findings from the Value Of Financial Planning¹ Research conducted by the Financial Planning Standards Council:

- 53% of the respondents who received limited financial advice believed they could take the vacation that they want every year, compared with 31% of those who did not receive any financial advice.
- 33% of the respondents who engaged in limited financial planning said they were on track to reach their desired lifestyle in retirement, compared to just 18% of those with no financial planning; and
- 60% of those who had limited financial planning agreed that the people they cared about would be financially looked after if anything should happen to them, compared to only 38% of those with no financial planning.

Once you decide what is most important to you, a financial plan will set your objectives into motion. With a financial plan, not only are you confident about your current financial situation, you also have the peace of mind knowing that you have given thought to your future and begun to build the path towards it.

Take control of tomorrow by creating a financial plan today. A CIBC Wood Gundy Investment Advisor can take you every step of the way towards creating a financial plan that gets you where you want to be. For more information, contact us today.

¹ The “Value of Financial Planning”, is a comprehensive five-year research study on the value of comprehensive financial planning and of professional financial planning advice. The first phase of the study was conducted between August 2009 and January 2010 and featured survey responses from more than 7,300 English speaking Canadians across the country except Quebec.

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