


Maximize
Your Life's Work.™

20 SIGNS YOU'RE GETTING ADVICE,
NOT A PLAN



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IS YOUR ADVISOR HELPING YOU BUILD LASTING WEALTH, OR JUST ANSWERING YOUR QUESTIONS?

Many successful Canadian families think they have a financial plan. In reality, they're getting advice; reactive, one-off suggestions that may miss the bigger picture, costing them big time. This checklist will help you assess if you're getting the proactive, strategic planning your wealth deserves.



GO THROUGH THIS CHECKLIST TO SEE HOW MANY BOXES YOU CAN CHECK:

- I HAVE A WRITTEN, UP-TO-DATE FINANCIAL PLAN WITHIN THE LAST 18 MONTHS.
- MY FINANCIAL PLAN IS UPDATED ANNUALLY.
- MY ADVISOR ASKS ABOUT MY LONG-TERM GOALS AND UPDATES MY PLAN PROACTIVELY.
- MY PLAN COVERS MORE THAN JUST INVESTMENTS AND INSURANCE (E.G., TAXES, INCOME PLANNING, CORPORATE STRUCTURING, CREDITOR PLANNING, BUSINESS SUCCESSION).
- MY SPOUSE/PARTNER IS INVOLVED IN ALL PLANNING CONVERSATIONS.
- I FEEL LIKE I AM GETTING INDIVIDUAL, TAILORED ADVICE BASED ON MY UNIQUE GOALS AND OBJECTIVES.



COORDINATION & EXECUTION

- MY ADVISOR COMMUNICATES WITH MY ACCOUNTANT AND LAWYER REGULARLY.
- MY TAX STRATEGY IS REVIEWED AT LEAST ANNUALLY.
- MY ESTATE PLAN IS ALIGNED WITH MY GOALS AND HAS BEEN REVIEWED IN THE PAST 2 YEARS.
- MY ADVISOR HAS DEMONSTRATED GREAT KNOWLEDGE IN PLANNING BEYOND JUST INVESTMENTS (EG. TAX, CORPORATE PLANNING, INCOME PLANNING, TRUST AND ESTATE PLANNING)
- MY ADVISOR UNDERSTANDS MY CORPORATE PLANNING AND INTEGRATES IT INTO MY PERSONAL PLANNING.
- I UNDERSTAND HOW MY INVESTMENT STRATEGY CONNECTS TO MY OVERALL FINANCIAL GOALS.



CONFIDENCE & VALUE

- I FEEL CONFIDENT AND IN CONTROL OF MY FINANCIAL FUTURE.
- I HAVE PRESET MEETINGS WITH MY ADVISOR TO DISCUSS MY GOALS AND PROGRESS.
- MY ADVISOR PROACTIVELY BRINGS OPPORTUNITIES OR RISKS TO MY ATTENTION.
- I KNOW WHAT I'M PAYING, AND IT'S CLEAR HOW MY ADVISOR IS COMPENSATED.
- I FEEL SUPPORTED IN MAKING IMPORTANT LIFE AND FINANCIAL DECISIONS.
- MY FAMILY WOULD FEEL CONFIDENT IN SEEKING HELP FROM OUR ADVISORS SHOULD I PASS AWAY.
- IF I DIED, MY ADVISOR WOULD KNOW EVERYTHING ABOUT MY FINANCIAL SITUATION AND WOULD BE ABLE TO HELP MY FAMILY.
- MY ADVISOR MAKES ME FEEL IMPORTANT TO THEM, AND NOT JUST ANOTHER CLIENT.



HOW MANY BOXES DID YOU CHECK?

If fewer than 12, you may be just receiving financial advice and not getting true financial planning. Let's fix that. If you want to be able to check off all the boxes above, connect with us to learn more about the important work we do. We would love to hear from you!

TO LEARN MORE OR SCHEDULE A CONVERSATION,
VISIT THREE60WEALTH.CA OR CALL US TODAY AT 403.640.4414

