We Plan. You Prosper. Smart investment management.

PLAN FOR WEALTH
we plan. you prosper.

EXCELLENT SERVICE, SUPPORT AND ADVICE

- **Have your ever left your financial** institution more confused than when you arrived?
- Did you have to wait days for an appointment to speak with someone about your savings?
- Have you ever opened a TFSA or RRSP account at your financial institution however weren't truly sure how it was of benefit to you?
- Personal financial planning and budgeting services available with no judgement and no hidden agenda.
- You should always feel like your savings strategy is just that -yours. Not in the best interest of anyone else.

ATTENTIVE PORTFOLIO MANAGEMENT

- We work with you to offer an attractive investment selections that maximizes your potential for returns
- There is no one single solution for your retirement. Your savings need to evolve *with* you.
- We are present, no waiting days for a call or email back – helping is a passion for us.
- We monitor markets daily, making changes and envolving with economic market conditions to sieze opportunity or to protect your hard-earned savings.

DO YOU HAVE YOUR MONEY IN...

- TD Canada Trust Comfort Funds
- Scotia Portfolio or Scotia Aria Solutions
- RBC Select Portfolios or RBC Global Asset Management
- Any other bank or retail financial source?
- Is this working for you? Do you want to explore options to get your savings working harder for you?

Who is Plan for Wealth Ltd?

Rhonda Martin is a seasoned veteran in the life, health and wealth management industry and understands the needs of business and the pressures on Canadian families.
Zach Davidson brings a wealth of banking, insurance and investment knowledge and experience. Together we pride themselves on personal client attention, service and financial expertise to achieve financial stability and short and long term opportunities. Our clients know why their investment solutions are structured for them. They know their money is monitored and adujusted to the economic environment. Growing and protecting your money is our business. It is how we plan, and you prosper.

Located inside Staebler Insurance
at: 871 Victoria St. N
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Proud Partners of Staebler Insurance

A trusted referral partner
Located on-site in the Staebler offices

Your Money Working Smart, So You Can Work Less

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When is it time to review your savings

Any time!
Reviewing your finances is best sooner than later.

- Saving smaller amounts over a longer period of time is easier than larger amounts over a shorter period.
- Would you rather save $105/month over 25 years or $390 per month over 10 years. Both would have you $60,000 with 5% compounding annual interest.
- You would need to save $100/monthly for 50 years to achieve the same amount. Not taking some risk IS taking risk, time is not on your side when you delay saving. So, let's get started!

Can you switch your servicing advisor?

Yes!
If we seem like the right fit for you.

- We work within your budget and review what is important to you.
- We prepare a portfolio recommendation for your approval
- If transferring funds from another institution, we prepare the paperwork and initiate the transfer for you. No awkwardness in approaching your current institution.
- We pay attention to your investments, and recommend changes along the way to position your portfolio for success.

Key Considerations:

- Do have a plan for your short and long term needs?
- Do you feel confident in your current finances?
- Do you have a trusted person at your current financial institution?
- Do you feel they look after your evolving needs?
- Do they provide ongoing advice?
- Will they go out of their way to assist you?

How do we get started?

Call us at **519.778.0905** to book a review meeting.
Share your plan information confidentially with us.

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