



# Your partner in reaching your financial goals

Client name \_\_\_\_\_

Date \_\_\_\_\_

Freedom 55 Financial offers a broad range of products from leading financial companies:

- Individual life insurance
- Segregated fund policies, RRSPs and LIRAs
- Payout annuities, RRIFs and LIFs
- Individual disability insurance
- Individual critical illness insurance
- Individual health and dental insurance
- Group insurance
- Group retirement plans
- Solutions Banking™

Quadrus Investment Services Ltd. offers:

- Mutual funds – RESPs, RRSPs and RRIFs

Helping you meet your goals at every stage of life

## Building a financial security plan

I use a planning process focused on helping you achieve your goals and dreams, whatever they may be. Using this process, I'll:

- Gain a better understanding of what financial security planning means to you
- Analyze your situation and identify gaps
- Build a plan to help you achieve your short- and long-term goals and dreams
- Review and monitor your plan regularly to ensure it meets your changing needs



**Freedom 55  
Financial**

Financial services firm,  
Firm in financial planning

**QUADRUS**

Quadrus Investment Services Ltd.

Firm in financial planning,  
Firm in group-savings-plan  
brokerage



**Freedom 55  
Financial**

A division of London Life Insurance Company

**QUADRUS**

Quadrus Investment Services Ltd.

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# Keep dreaming but start planning

A solid financial security plan is key to reaching your goals and dreams.  
Do you have a comprehensive plan in place to help you get there?

Take a few minutes to consider the following questions.

Liquidity	Yes	No	Unsure	N/A
I have money set aside for emergencies .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I maintain a comfortable margin between my expenses and income .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When I have a major purchase in mind, I establish a systematic savings plan to ensure I meet my goal .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  

Disability	Yes	No	Unsure	N/A
I can afford to maintain my standard of living in case of disability.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I own disability insurance through work .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I could continue to build my retirement plan in the event of prolonged sickness or injury .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  

Financial security at death	Yes	No	Unsure	N/A
My family could afford the lifestyle they enjoy today in the event of my death....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have my insurance needs professionally assessed regularly .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understand how inflation will affect my life insurance over time .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  

Retirement	Yes	No	Unsure	N/A
I have started planning for retirement .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I use investment principles within my financial security plan.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I review and update my retirement plan yearly and invest within my risk tolerance regularly.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Lay a solid foundation for your financial freedom

