

Key Issues Survey

Please complete this short survey enabling me to better understand your needs.

1. If you accumulated as many NET assets in the NEXT five years as you just did in the LAST five years, are you going to be satisfied with your progress at that point?

- Yes No I don't know

3. How many weeks of your typical month in retirement are FULLY funded by your current plans (based on date of retirement until end of projected life expectancy):

- First week only Two weeks Three weeks
 All four weeks I don't know

4. Does your current life insurance pay you immediately to stay at home on diagnosis of a critical illness – or would you have to go to work while critically ill?

- Pays me to stay at home while recovering I do not know
 I would still have to go to work

5. Based on your current financial plan, for how many of your children will you be able to provide full funding for their post-secondary education:

- One child Two children Three children
 All of our children I do not know

For Business Owners Only:

6. For how long does How many weeks of your partnership agreement guarantee the salaries of directorstypical month in the eventretirement are FULLY funded by your current plans (based on date of serious illness or disability?retirement until end of projected life expectancy):

- 1-3 months 4-6 months
 First week only No provision in place, as far as I know. Please show me how
Two weeks to use government
money to provide these securities Three weeks
 All four weeks I don't know – help me find out

7. Do you draw the full compensation you are entitled to from your company to remunerate you for the second signature you gave to your bank as personal guarantees?

- Draw maximum compensation
 Do not draw maximum compensation
 How do I draw this compensation and how much should it be – please inform me

8. Are your business partnership arrangements structured to leave your spouse with inflexible or unmarketable company shares instead of ready cash in the event of your critical illness, disability, or death?

- He/she would only inherit shares
 He/she would receive cash
 They would have enough to survive on while maintaining their current employment
 I have no idea – please consult with me on this issue