



SHEknows.....she on her way to financial independence

The following is a list of accomplishments or a part of your plan you are implementing:

- Up-to-date Wills/Powers of Attorney or Family Trust Documents
- Personal Budget Worksheet
- Emergency Fund
- Debt Reduction
- Income Replacement
- Life Insurance
- Disability Insurance
- Critical Illness Insurance
- Long Term Care
- Tax Free Savings Account
- Children's RESP's
- Retirement/Investment Planning
- RRSP's
- Contribution to Company Pensions
- Non-Registered Investments, e.g. TFSA
- Real Estate
- Stocks
- Plan to pay down mortgage