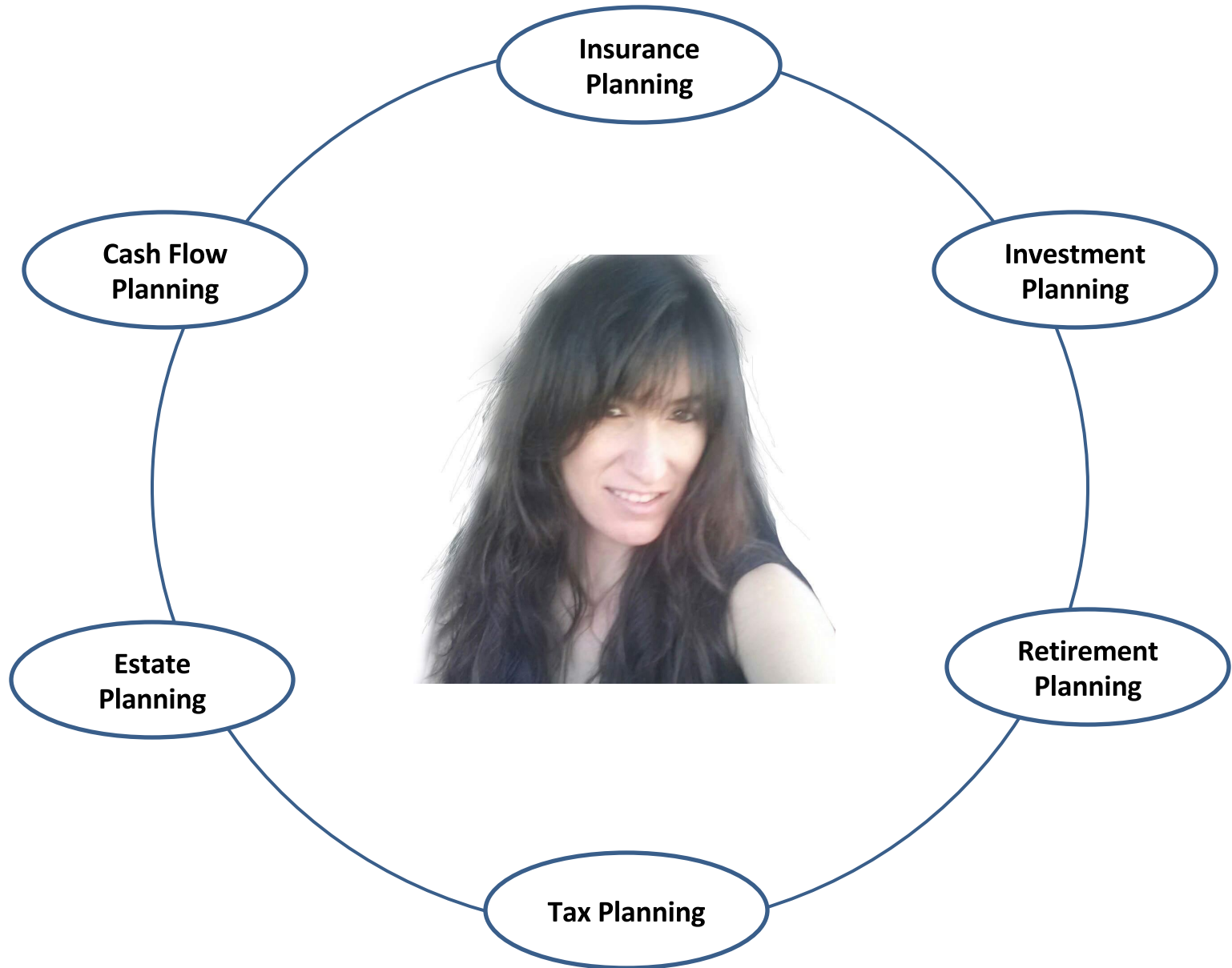


Disciplines of Financial Planning



Clients point of view & factors

Age - time line - destination

Desires

Chief aim

Goals

Dreams

Requirements - value - life

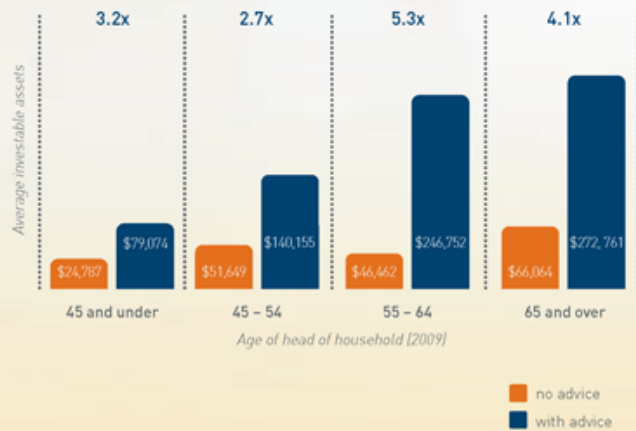
Marketing strategies

- Referrals
- Tradeshows
- Welcome wagon
- Golf events
- Lunch and Learn
- Community Services
- Networking events
- Lumpy mail
-



The value of advice

Household age



Source: Ipsos Reid 'Canadian Financial Monitor', special analysis for IFIC, 2010



Household income



National data shows that Canadians at any age and income level can benefit from having a financial advisor.

Source: Ipsos Reid 'Canadian Financial Monitor', special analysis for IFIC, 2010