

# Sharon Chartrand Business Presentation

Financial steps: Insurance & Investments

# Impact Client, through product and knowledge.

Today launches a new beginning, I am seeing communities companies and businesses all coming together to create a better tomorrow! I know WE are having a huge impact in our communities and it shows how caring WE are!

# The Value of Advisor

## Average invest Household Age

|                   |                         |
|-------------------|-------------------------|
| age 45 and under: | 3.2 times more invested |
| age 45-54:        | 2.7 times more invested |
| age 55-64:        | 5.3 times more invested |
| age 65-over:      | 4.1 times more invested |

based on 2009 stats.

**My Goal is to help families.**

**Customer experience made easy!**

As a Financial Educator, I'm here to help you with your financial planning through Dream map strategies and techniques. Through Dream map my clients will receive help with building their portfolio so they can achieve their dreams.

# My Personal Strategies: Dream Map(what do you want)!

Goals Energy Stages  
Personal financial review,

- I know what I want
- Chief Aim
- Goal
- Dreams

# My Clients are anyone and everyone.

In today's economy everyone can use a financial background.

Why, to know how money impacts their life for today and tomorrow!

From young to old. For today's world and the impact of tomorrow world.

# My Game plan is to Educate You!

Do you know the rules and regulations of today's economy  
To save on Taxes and know strategies to increase your  
cashflow. Threw product awareness, I can teach you if  
you're coachable and committed to sticking with a Plan.  
Your Commitments may change but a plan of action is  
your Goal.

# Why Me, I will look at Your Energetic Factors for Your success.

Areas we cover, WHO ARE YOU!

- STATE: HOW YOU SHOW UP
- ACTION: WHAT YOU DO
- INTENTION: WHERE IT ALL BEGINS



# Disciplines of Financial Planning

- Insurance Planning
- Cash Flow Planning
- Emergency Funds Planning
- Estate Planning
- Tax Planning
- Retirement Planning
- Investment Planning

# I am Unique

Then we go through Your

- Tasks
- Keystone Goal
- Chief Aims
- Dreams

Then we determine your next possible action step.

# Can you afford Not to find out more\$

For more information, please contact me.

Sharon Chartrand  
Financial Educator

Cell: 604 835 7242