

Helping you reach
your goals
at every stage of life



MILESTONE

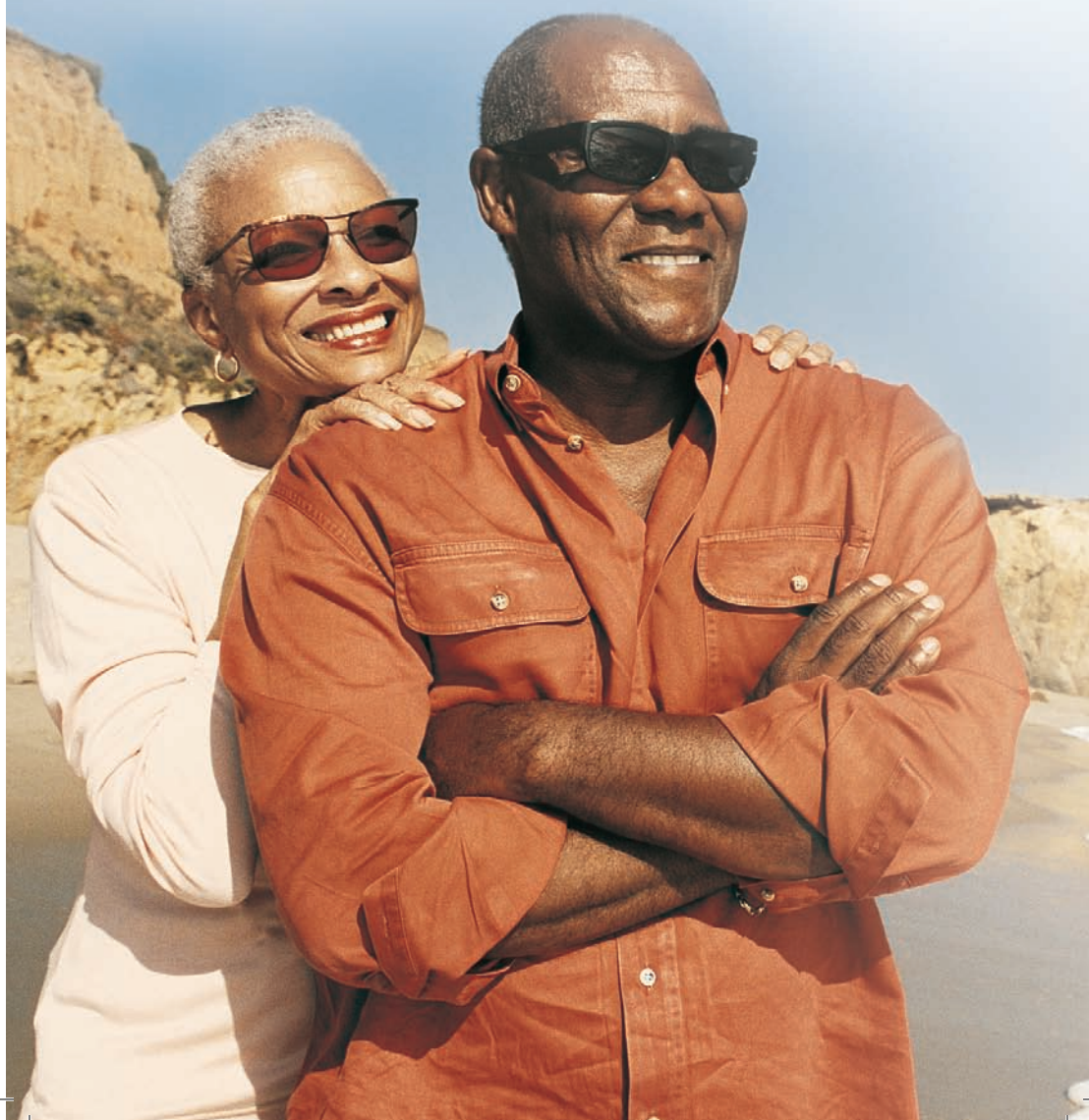
WEALTH & ESTATE
PLANNING GROUP INC.

making every mile count

QUADRUS

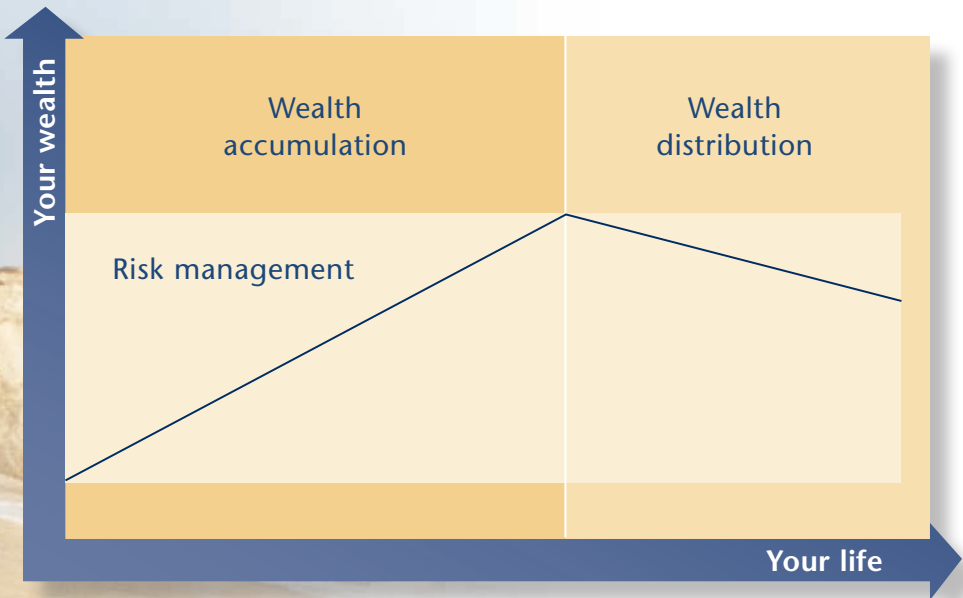
Quadrus Investment Services Ltd.

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

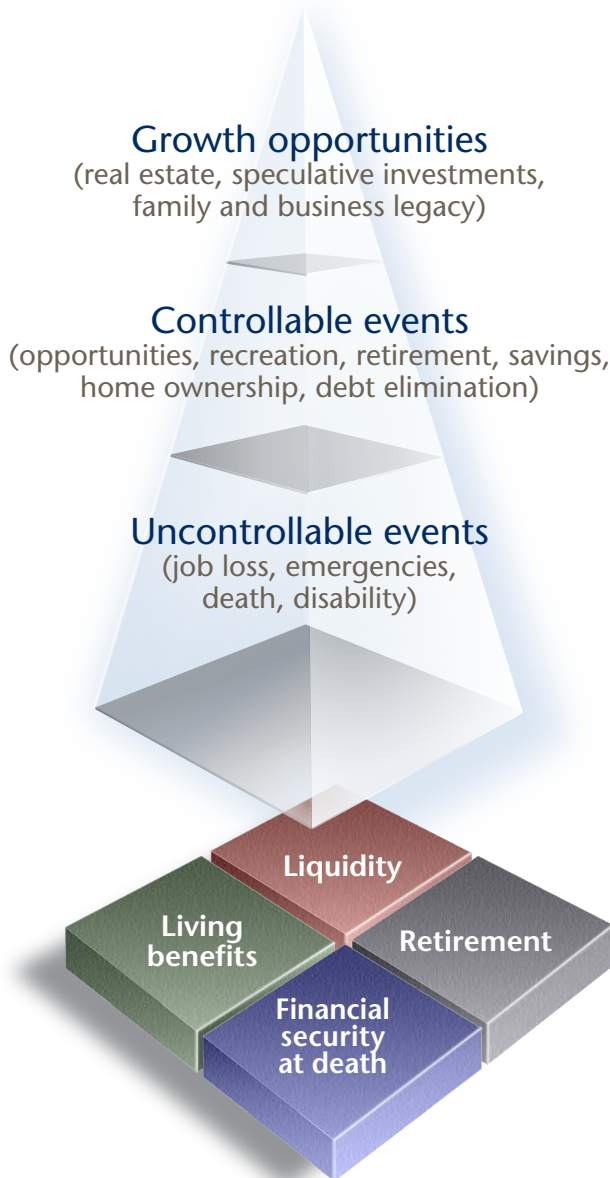


Achieving your goals takes careful planning

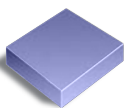
Whether it's dreams of retirement or specific goals such as saving for a child's education or protecting your family in the event of death, Milestone Wealth and Estate Planning Group has the financial security planning solutions that will help you get there.



Lay a solid foundation for financial independence

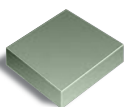


The four cornerstones



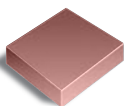
Financial security at death

What will happen when you die?



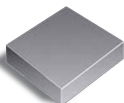
Living benefits

What would happen if your health failed?



Liquidity

What will happen when you need cash?

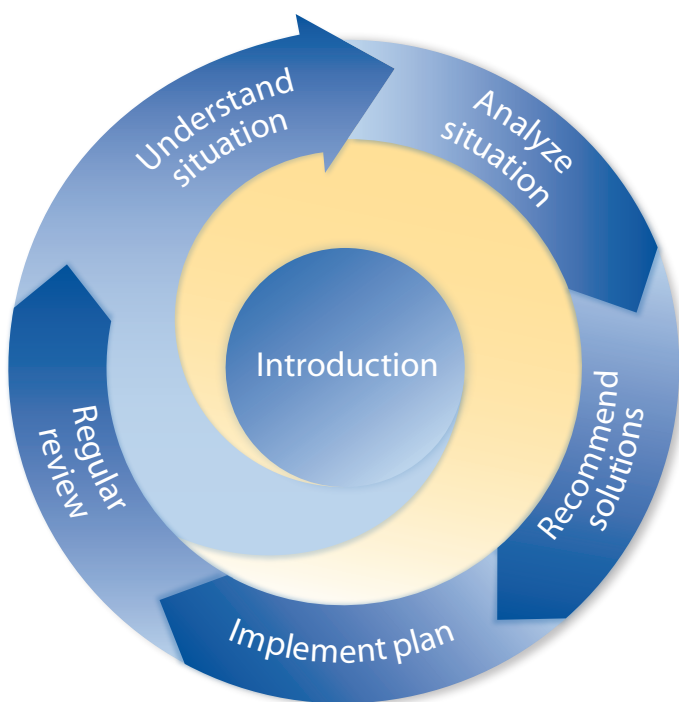


Retirement

What will your retirement be like?

Building your financial security plan

We use a planning process focused on helping you achieve your goals and dreams, whatever they may be.



The team

behind your financial security plan

We're supported by a team of experts in:

- Retirement and investment planning
- Life insurance
- Banking and mortgages
- Living benefits
- Employee benefits
- Tax and estate planning



Solutions

to meet your needs

Your plan

Risk management

- London Life Insurance Company
- The Great-West Life Assurance Company
- Sun Life Financial
- Manulife Financial

Investment management

- Quadrus Group of Funds
- Mackenzie Financial Corporation
- Invesco Trimark Ltd.
- AGF Funds Inc.

Our next meeting

Time: _____

Location: _____

Information to collect

Please collect copies of the following information and documents

- | | |
|--|--|
| <input type="checkbox"/> Tax returns, including last year's notice of assessment | <input type="checkbox"/> Loan statements (or balance owing) |
| <input type="checkbox"/> Employer pension statements | <input type="checkbox"/> Mortgage information (balance, renewal date, carrier) |
| <input type="checkbox"/> Life insurance and living benefits (disability and critical illness) insurance policies | <input type="checkbox"/> Information regarding power of attorney |
| <input type="checkbox"/> Most recent CPP statement | <input type="checkbox"/> Credit card balances |
| <input type="checkbox"/> Savings bond information | <input type="checkbox"/> Employee benefit booklets (group and pension) |
| <input type="checkbox"/> Most recent investment statements | <input type="checkbox"/> Pay statements |
| <input type="checkbox"/> Budget of personal and living expenses | <input type="checkbox"/> Other relevant documents |

Your partner in reaching your financial goals

Contact us to help answer your financial security planning questions.



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