

Five Money Questions for Women



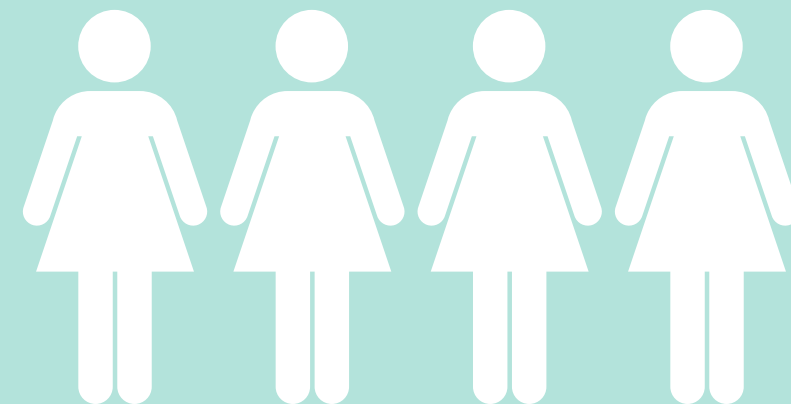
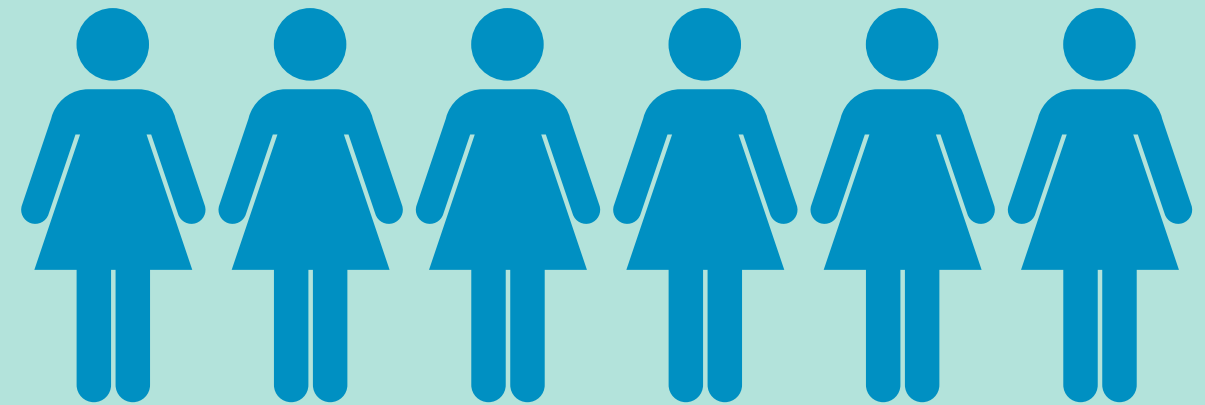


Connecting
with your
financial goals

Fact Fiction?

Fact **or** Fiction?

Nearly 60% of working individuals have calculated how much they'll need for retirement.



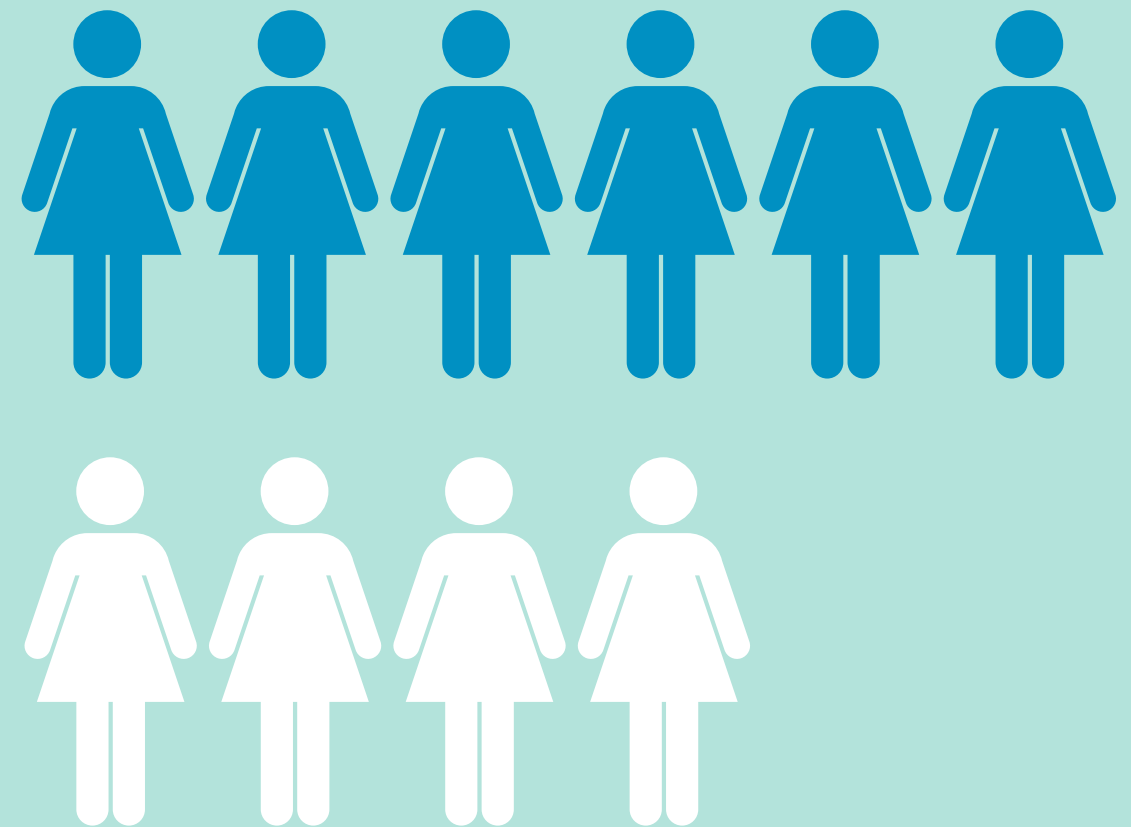
Fact **or** Fiction?

96% of women have either primary, or shared responsibility for making family financial decisions.

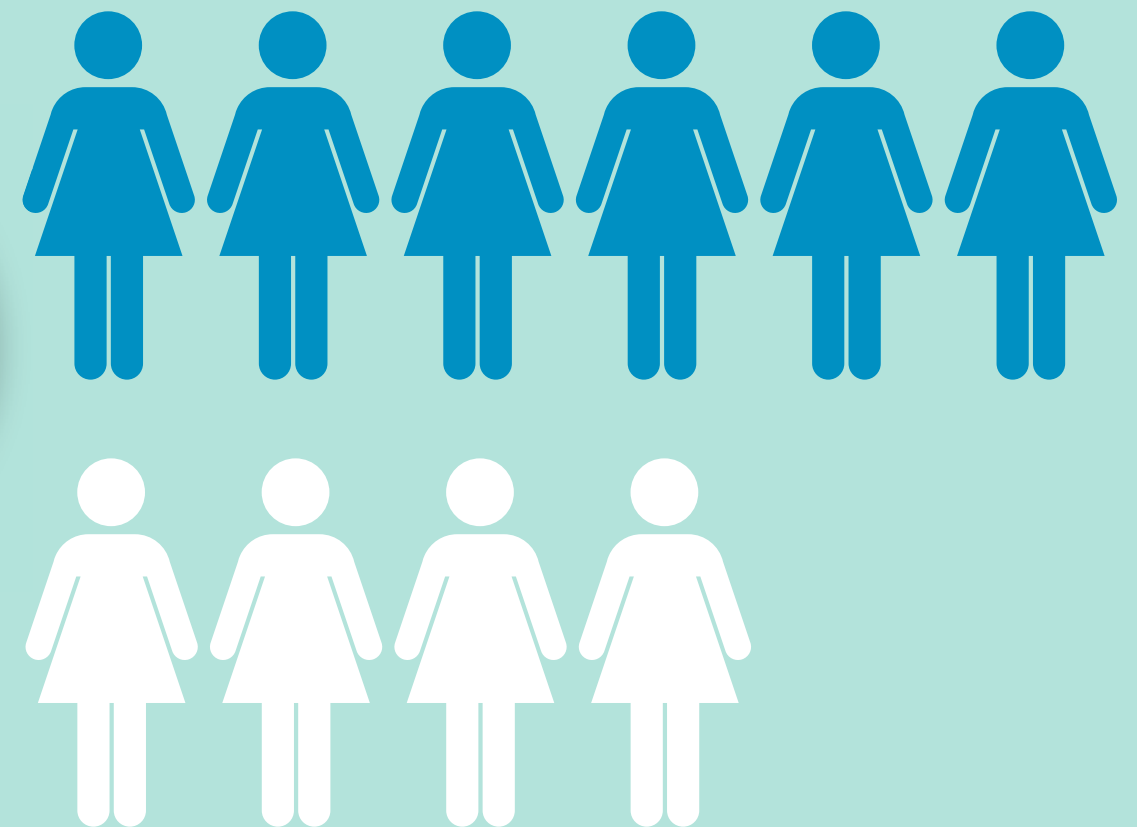


Fact **or** Fiction?

By 2030, women will control two thirds of all accumulated financial wealth.



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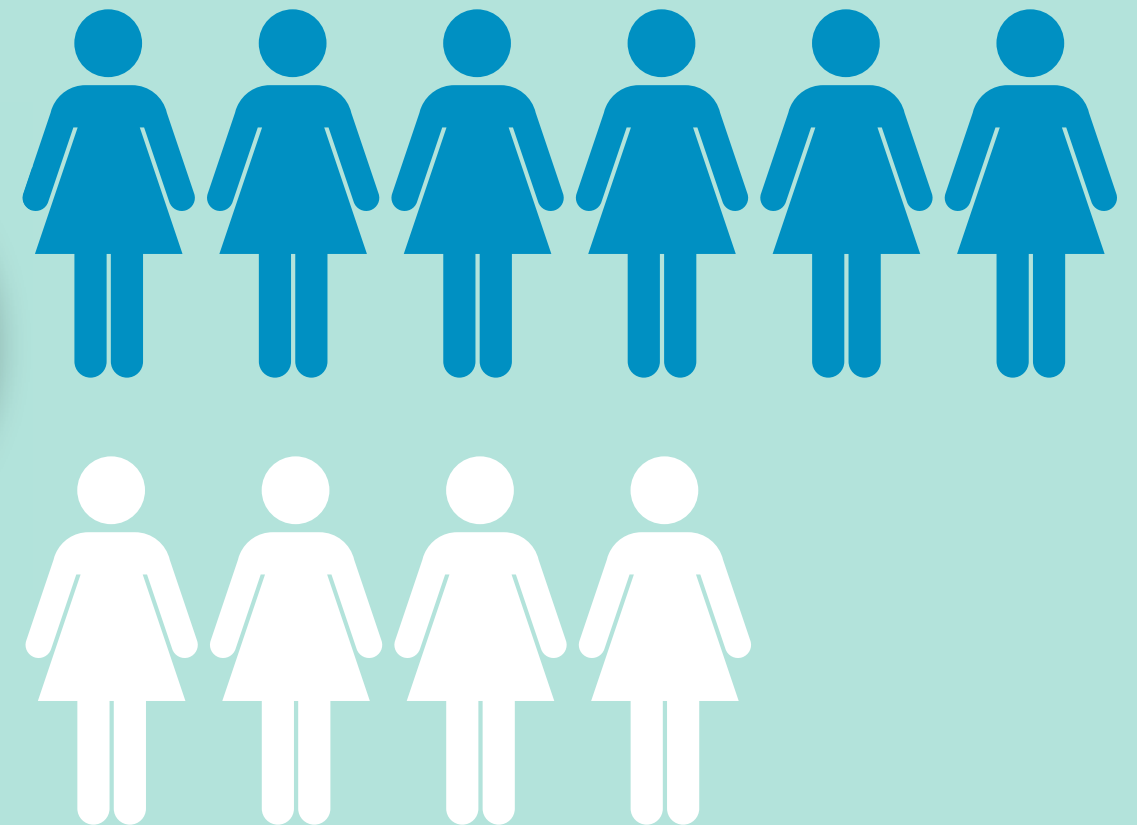
Fact

12
years



By 2030, women will control two thirds of all accumulated financial wealth.

Fiction



Don't Wait

Until you're forced to
take responsibility for
your financial future.

Five questions

You can ask to connect to your financial goals





1

Where am I today?

Where would I like to be?

2

Values vs Goals

**Imagine
your goals**

Common primary financial needs

- Managing debt
- Buying a new home or cottage
- Financial independence
- Having a comfortable retirement lifestyle
- Establishing purpose in retirement
- Travelling, now and/or in retirement
- Funding a child's or grandchild's education
- Being prepared for unforeseen illness, injury, etc.
- Gifting assets to family or family
- Planning your estate transfer
- Philanthropy
- Giving to charity



Meet Denise

- Oldest of three
- HR professional
- Divorced; remarried



Denise's goals

An emergency fund

3

Can I get there?

S.M.A.R.T goals

- S** pecific
- M** easurable
- A** chievable
- R** elevant
- T** ime-framed

How do I get there?

4

Determine your strategy

- Financial Assessment
- Asset Strategies
- Tax Strategies
- Retirement Planning
- Risk Assessment
- Estate Planning

Denise's goals: University for Bree



Funding a child's education

- Registered Education Savings Plan
 - \$2,500 annual contribution
- Canada Education Savings Grant
 - \$500 matching grant

A disciplined approach

Four “C’s” of systematic investing

- Convenience
- Consistency
- Choice
- Control

Having a comfortable retirement lifestyle

Employer-sponsored

Retirement plans

RRSP and TFSA

Denise's goals

Preparing for retirement

The biggest mistake
people make when it
comes to investing is
not getting started.



Don't Wait

How can I stay on track?

5

Don't
Wait

Until you're forced to
take responsibility for
your financial future.

Our value proposition

- Understand what's important to our client
- Use an established process to create personalized strategies
- Partner throughout life to help keep them on track



A team approach for our clients



Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. Clients/prospective clients should consult their estate-planning lawyer or qualified tax advisor regarding their situation.

Get started
today

Questions & Answers

Thank you

Please complete your evaluation now