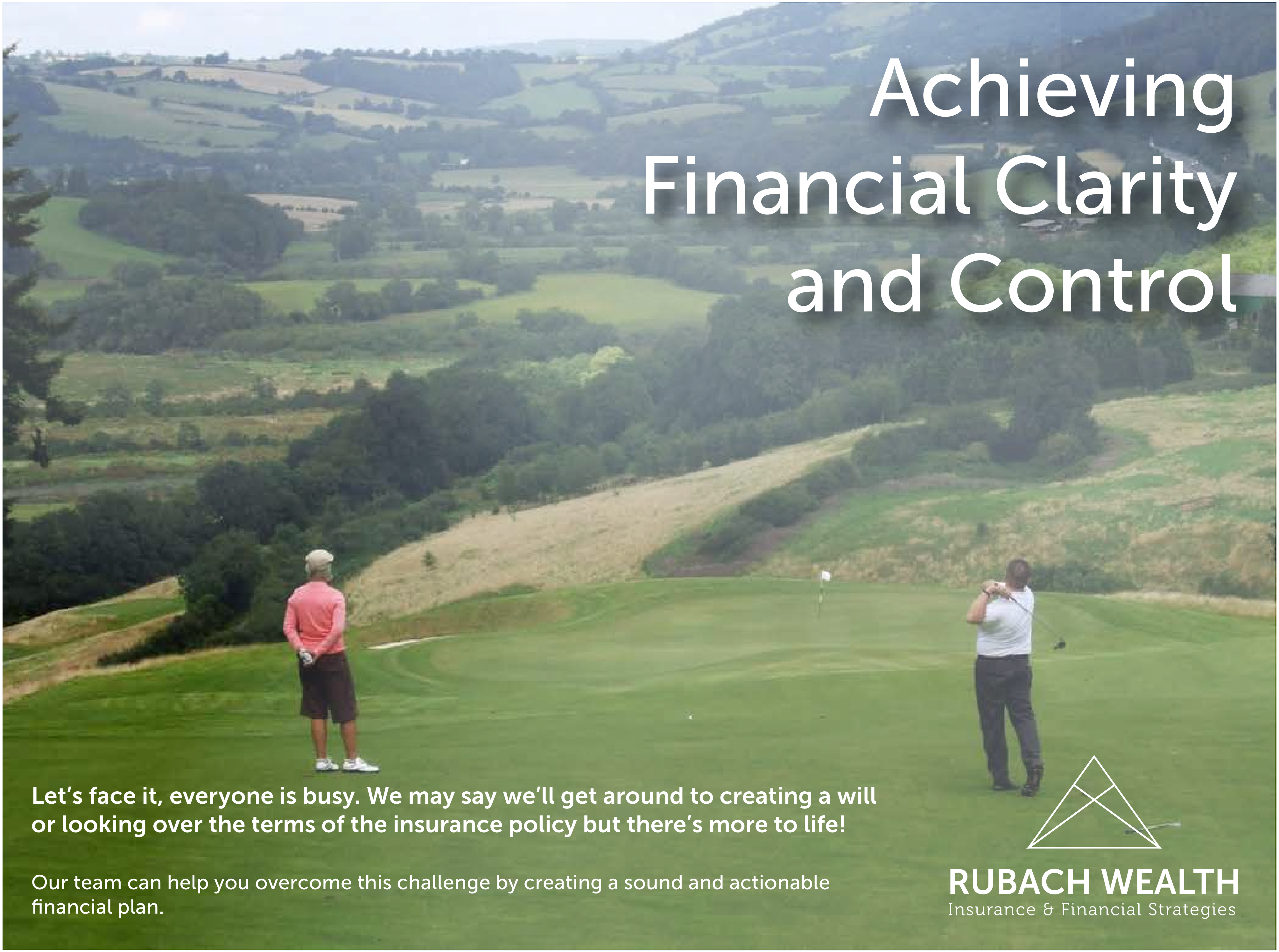


Achieving Financial Clarity and Control

Let's face it, everyone is busy. We may say we'll get around to creating a will or looking over the terms of the insurance policy but there's more to life!

Our team can help you overcome this challenge by creating a sound and actionable financial plan.

RUBACH WEALTH
Insurance & Financial Strategies

You are building your future. We can help you protect your wealth so you can enjoy it to the fullest. Gaining financial clarity and control starts with knowing where you stand.

First, the must-haves:	Yes	No
1. Do you have a will?	☐	☐
2. Do you have powers of attorney?	☐	☐
3. Are you incorporated?	☐	☐
4. Do you have life insurance?	☐	☐
5. Do you have disability insurance?	☐	☐
a. What are you covered for? ____________________		
6. Do you have critical illness insurance?	☐	☐
a. How much are you covered for? ____________________		
7. If something happens to you, is it clear who has to do what?	☐	☐

Let's talk about savings and investments:

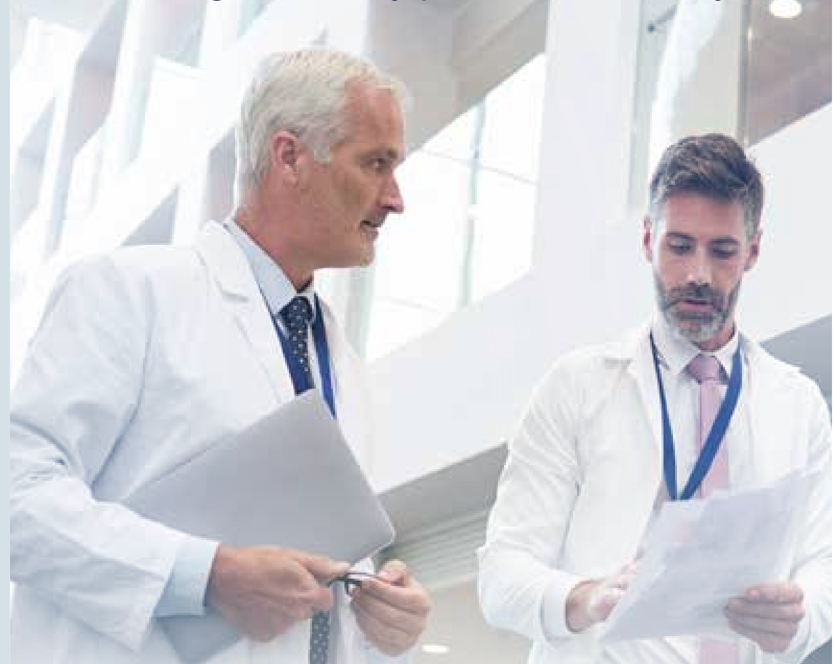
8. What type of investments and savings do you currently have?

RRSP	☐
TFSA	☐
RESP	☐
Other registered accounts	☐
Non-registered accounts	☐
Savings	☐

9. Where are they? ____________________

	Yes	No
10. Do you know their balances?	☐	☐
11. Do you have a financial plan or projection?	☐	☐

At Rubach Wealth, we know that completing this checklist may be daunting for a busy professional like you.



Would it help if we provided all this information to you as a single clear summary? We see this as a valuable component of ensuring that you have financial clarity and control, which in turn will allow you to continue doing what you do best – growing your business and your career.

Contact us today to find out how Rubach Wealth can help you start and make meaningful progress toward a brighter financial future.

RUBACH WEALTH
Insurance & Financial Strategies

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