Agenda

XXX & XXX
September XX, 202X

Purpose & Goals

XX/X/2023 Last Update Net Worth

\$X,XXX,XXX

Retirement Income

\$X,XXX /month Limit: \$X,XXX /month



\$XXX,XXXUpper

Guardrails

\$XXX,XXX Lower Tax Bracket

25.0% 25.0% xxx

Portfolio Value

\$XXX,XXX

INVESTORDNA

Action Items



Agenda

202X Annual Review

XXX & XXX

- is there anything you would like to add?
- 🗀 ...

InvestorDNA

- Purpose & Goals
- Net Worth
- ☐ Income & Guardrails
- ☐ Portfolio Review
- □ Action Items

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- □ XXX
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< Dashboard

Networth Savings

Savings Assets & Debt Income Insurance

| Client | Birthdate (Age) | Retirement Goal | RRSP Room | TFSA Room | Family Information |
|--------|-----------------|-----------------|-----------|-----------|--------------------|
| xxx | | | | | |
| xxx | | | | | |

| Savings | RRSPs, TFSAs, Non-Reg, RESPs, Employer group plans, Emergency funds, other investments | | | | | | | | |
|---------|--|--|-------------|-------|---|--|--|--|--|
| Owner | Purpose Type | | Institution | Value | Contributions, (Withdrawals) & Minimums | | | | |
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| Total | | | | | | | | | |

Legacy Goal

< Dashboard

Savings

Assets & Debt

Income

Insurance

Assets & Debt

| Assets | Principal residence, rental properties, secondary properties, art and other assets | | | | | | | |
|--------|--|-----------|-----------|-------|--|--|--|--|
| Owner | Description | Value | Cost Base | Notes | | | | |
| Joint | Principle Residence | \$XXX,XXX | | | | | | |
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| Debt | | | | | Mortgages, Loans, Lines of credit |
|-------|-------------|---------|-------|--|-----------------------------------|
| Owner | Institution | Balance | Notes | | |
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Dashboard Savings Assets & Debt Income Insurance

Networth Income

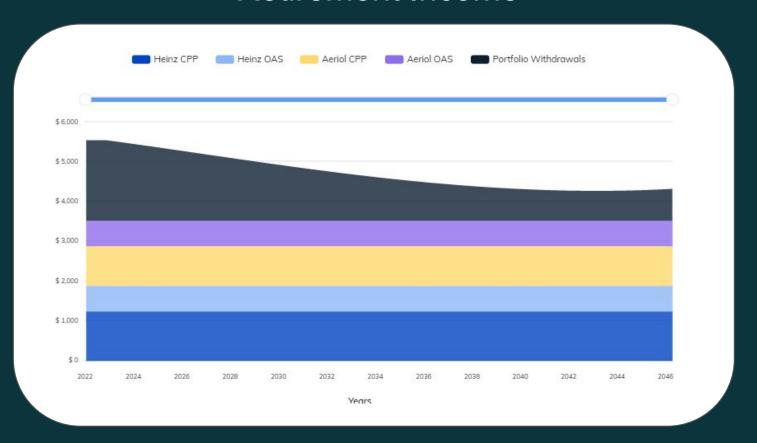
| Income | Employment Income, Government benefits, Pension, Investment withdrawals | | | | | | | |
|--------|---|---------------|----------------|-------|--|--|--|--|
| Client | Туре | Annual Amount | Monthly Amount | Notes | | | | |
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| Total | | \$XX,XXX | \$X,XXX | | | | | |

Dashboard Savings Assets & Debt Income Insurance

Networth Insurance

| Insurance | Life, Critical Illness, Disability | | | | | | | |
|-----------|------------------------------------|--------|---------|-----------|--------|-------|--|--|
| Owner | Term / Perm | Amount | Premium | Frequency | Period | Notes | | |
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Retirement Income



Retirement Income

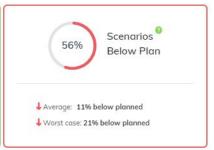


Retirement Income

Current Income

\$6,996





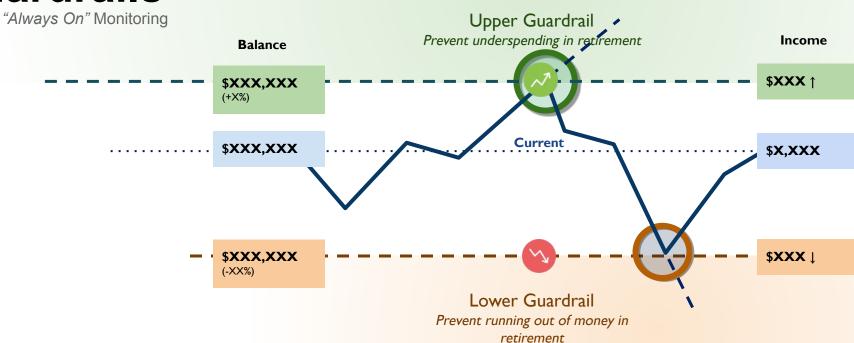
Recommended Income

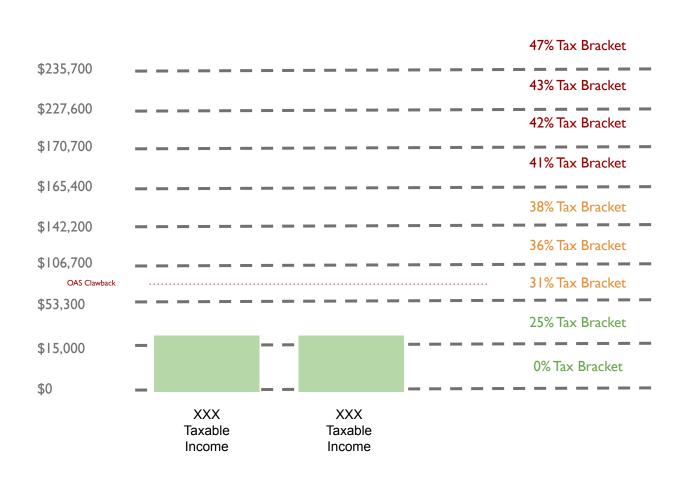
\$5,610

-\$1,386









Tax

2023 Rates

Max RRSP Contr: \$29,210

New TFSA Room:\$6,500

Max TFSA Room: \$88,000

Personal Amount: \$15,000

Age Amount: \$8,400

OAS Clawback: \$86,900
GIS Single Max: \$21,456
GIS Spousal Max: \$28k - \$51k

CPP Increase: 6.5% OAS Increase: 3.2%

Market Update

Performance Review

Results of Staying Invested



Market Update

Performance Review

Results of Staying Invested

Big News Headlines for 2023:

- □ XXX
- □ XXX
- □ XXX

What's in store for the near future?

- □ XXX
- □ XXX
- □ XXX

"Investing Quote"

Market Update

Performance Review

Results of Staying Invested

Market Update

Performance Review

Results of Staying Invested



Action Items

2023 Annual Review

XXX & XXX

- □ XXX
- □ XXX
- □ XXX

XXXX

- □ XXX:
- □ XXX: