



GO

do good things for yourself

A healthy diet,
regular exercise,
annual checkups...

...just a little of the good you
do for yourself. There's a lot
you can't control – genetics,
the environment, the economy
– but there's real satisfaction
in doing everything right
for what you can control.

You'll always be at the mercy
of circumstance and chance.
How well you manage
will depend on your
Financial Fitness Solution.

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- Knowledge
- Integrity
- Results

On your mark...

Get Set...

GO

Financial Fitness Solution™
STEP BY STEP GUIDE



Your Financial Wealth Experts

Where do you stand right now financially?

Where do you want to be and what do you want to be doing six months, six years or even six decades from **today**?

The **Financial Fitness Solution™** looks at your needs, your dreams and your finances to come up with a personal financial fitness plan that lets you do what you want to do today, while pursuing your goals for **tomorrow!**

Because life is a marathon, not a sprint



How financially fit do you feel?

If any of these statements sound like they could have come from you, an assessment might make you feel better.

"I never hear from my advisor."

That's what we do best: support and service. Together we'll decide on a personal schedule to review your portfolio and we'll send you regular statements to keep you informed.

"My portfolio performance is lacking."

Maybe it's just the economy. Or maybe your investments don't match up with your risk profile. We can realign your portfolio to better suit your style.

"I don't have a sense of direction. My stuff is all over the place."

The Financial Fitness Solution™ clears up the confusion in three easy steps. Ready...Set...Go!

We can even help you set up financial safety nets to minimize the impact on you and your family if something unexpected happens.

When you're financially fit you've got confidence, strength and clarity.

STEP 1 Ready...



In step one we talk about your business, lifestyle and financial goals. This is where you share what you love about your life, what you may want to change and what you want to do with your future.

We want to know about the things that matter to you. Your hopes, wishes, plans and goals:

Short-term:

Vacation, new vehicle, home repairs or renovations.

Medium-term:

Send children to school, buy new home, start a business.

Long-term:

Retire, work part-time, travel.

Different goals will mature at different rates throughout your life. The information you give us here will set the baseline of your overall plan.

STEP 2 Set ...



Step two is an assessment of your current financial situation. All the information you've given us is matched up to your goals. From there we create your preliminary financial plan showing:

- Your financial standing today.
- Future goals and priorities.
- Investment strategies that fit your risk profile.
- Recommendations to get you where you want to be.

After we've reviewed the numbers and assessed your goals and we're sure the plan meets your needs, we formalize it and prepare to put it in motion.

STEP 3 Go!



In step three we use our recommendations to select your next steps and together we prioritize those steps for action. And as your life changes and evolves, so too might your goals change and evolve; which is why we check in annually.

We continue to monitor your plan to see if you're on track to accomplish what you first set out to do...because a lot can happen in a year.

Creating Plans for the Future Creating Plans for Life



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