

Your Annual Financial Checkup

You schedule an annual checkup with your doctor, but do you take your finances just as seriously?

FP CanadaTM recommends you meet with a professional financial planner at least once a year to take your financial pulse.



4 Easy Steps

1 Schedule



Action

Meet with your financial planner to review your financial plan at least annually

Why

To keep it current and on track to meet your financial and life goals

2 Prepare



Action

Get ready for the checkup by preparing a synopsis of life changes in the previous 12 months, compiling a list of questions for your financial planner and gathering relevant documents such as tax returns and insurance policies

Why

A clear understanding of your current personal circumstances and changes to your goals will allow your financial planner to provide the best possible advice on how to amend your plan and move forward

3 Analyse & Adjust



Action

At the meeting, your financial planner will assess your financial health and, if necessary, recommend adjustments to help you achieve both short and long-term objectives



Why

Changes in your financial and life goals or adjustments to your future plans, such as planned retirement age or estate planning, could require changes to your financial plan

4 Repeat



Action

Meet with your financial planner more often than once a year if necessary



Why

Salary increases or decreases, a new baby or home, increased insurance needs or any other life event that could impact your financial plan should be reviewed with your financial planner so that the plan can be adapted as soon as possible to your changed circumstances



To schedule an appointment with a financial planner in your area, visit [FindYourPlanner.ca](https://www.findyourplanner.ca)