

# Is your existing retirement plan an Oasis or Mirage?



Live *your* dream.

Here are 8 vital questions to ask of your existing retirement plan.

## Ask yourself these important questions:

1. Do you have a continuously updated financial plan? (...or is it a retirement projection?)  Yes  No
2. Does your plan constantly evolve with market conditions and your personal circumstance?  Yes  No
3. Has your portfolio been designed specifically for you? (...or is it a cookie cutter portfolio created for people like you?)  Yes  No
4. Have you attached meaningful goals and objectives to your retirement plan? (If not, how will these desires ever be realized?)  Yes  No
5. Is the success of your retirement plan measured against bench marks? (these benchmarks should include a “rate of return” required from your retirement plan and the respective market indices)  Yes  No

## Another important factor to consider:

6. Do you know the “number” required to maintain your standard of living for the future? (Your “number” is the lump sum of savings required, after inflation and taxes to sustain your lifestyle.)  Yes  No

## Factors for Business Owners:

7. Are you so consumed with the running of your business that you spend little to no time on how to save taxes and effectively plan for retirement?  Yes  No
8. Are your existing financial professionals (financial advisor, lawyer, accountant & banker) working in “lock step” to ensure that collectively you are efficiently covering your risks? (...or do they work in isolation of each other to your detriment?)  Yes  No

If you answered *No* to any of these questions, we would like to invite you to call Roy or Michael at 613 569-7020 or [click here](#) for your **Free Report** *The Retirement Income Survival Guide for Canadians – 2009*