



Our Financial Plans

Insurance & Investments

This is the *Our Financial Plans* 12 Square Challenge. You can use this document to measure where you stand across the important aspects of protection and retirement.

It should only take you 5 or 10 minutes to complete.

HOW DOES IT WORK?

Complete the worksheet by answering the questions below and filling in your answers in the spaces. For example, if you became permanently disabled, how much would you receive from the government, your employer or your own personal plans? If you're unsure, leave the section blank.

- What will you receive if you became permanently disabled?
- How about if you had a serious or critical illness?
- How much will you receive at your retirement?
- What will your spouse or family receive at your death?

	GOVERNMENT	EMPLOYER	YOU
Disability			
Critical Illness			
Retirement			
Death			

HOW DID YOU DO?

Most people find they left some sections blank. The question is are these areas of concern? Can we help answer some of your questions or talk about this further?

While we all recover from COVID-19, why not setup a phone appointment? There is no cost to our services, and it's strictly confidential.

It's easy to reach us- by phone: **705-949-1316**, email: info@ourfinancialplans.ca, through our website or through FaceBook, or you can easily schedule a phone call through MicroSoft Bookings.