Four Points
FINANCIAL SOLUTIONS

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Service Questionnaire

We have worked hard to provide our clients with services to enhance their financial well-being. Sometimes in the hustle and bustle of the moment, we may neglect to make all of our clients aware of all the services that we offer, and how these services could benefit you.

To help us serve you more effectively, we would appreciate greatly if you would take a couple of minutes to complete this brief questionnaire. We want your experience with us to be a great one!

How did you hear about us?

- ❑ Referred by: ___________________________
- ❑ Newspaper: ___________________________
- ❑ Seminar/Workshop attendance
- ❑ Website
- ❑ Yellow pages
- ❑ Other: ____________________

Which of these subjects are of interest to you? (You can check as many of these as appropriate.)

Services

- ❑ **Retirement Planning** – Developing a strategy to ensure you achieve your retirement objectives or, if you are already retired, knowing the level of income you will be able to maintain over your lifetime.
- ❑ **Investment Planning** – Analyzing your existing investment portfolio to identify the likely long-term rate of return you'll achieve as well as a review of your investment philosophies and objectives in order to identify an appropriate alternative strategy.
- ❑ **Tax Planning** – Identifying ways to reduce your income taxes both now and in the future.
- ❑ **Estate Planning** – Reducing your estate settlement costs through effecting planning.
- ❑ **Risk Planning** – Ensuring your family is protected in the event of death or disability.
- ❑ **Comprehensive Financial Planning** – Creating a comprehensive strategy to deal with all of the above areas of concern.

Products

- ❑ **RRSPs & RRIFs** – Getting the best returns on your Registered Retirement Savings Plans (RRSPs) and Registered Retirement Income Funds (RRIFs).
- ❑ **GICs** – Getting the best rates on your Guaranteed Investment Certificates (GICs) or term deposits.
- ❑ **Alternatives to GICs** – Learning about convenient alternatives to GICs (e.g., government bonds, guaranteed income funds).
- ❑ **RESPs** – Learning about the benefits of a Registered Education Savings Plan (RESP) for children and grandchildren (using the 20% government grant).
- ❑ **Professional Money Management** – Learning about the benefits of professional money management.
- ❑ **Life Insurance** – Reviewing existing life insurance in force.
- ❑ **Disability Insurance** – Reviewing existing disability insurance currently in place.

Please tell us about any other financial concerns that you may have:

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Name: ________________________________

Address: ____________________________________ **Postal code:** ____________

E-mail address: ______________________________ **Phone:** _______________

Thank you for taking the time to complete this brief questionnaire. It will help us serve you more effectively.