

## Living Desired Lifestyle

## Values, Beliefs, Goals, Objectives

## Client (Spouse, Family, Relatives, Friends)

## Transition Financial Advisors

## Comprehensive Overview

Cash Management Planning	Income Tax Planning	Independence/ Education Planning	Risk Management	Estate/ Charitable Planning	Investment Planning	Immigration Planning	Customs Planning
<ul style="list-style-type: none"> <li>✓ Mortgage broker</li> <li>✓ Banker</li> <li>✓ Currency exchange firm</li> <li>✓ Realtor</li> <li>✓ Auto Dealer</li> </ul>	<ul style="list-style-type: none"> <li>✓ US Accountant (CPA)</li> <li>✓ Cdn Accountant (CA)</li> <li>✓ Bookkeeper</li> <li>✓ Tax Attorney (Cdn, US)</li> <li>✓ Canada Customs &amp; Revenue Agency</li> <li>✓ Provincial taxing authority</li> <li>✓ Internal Revenue Service/US Dept. of Treasury</li> <li>✓ State taxing authority</li> </ul>	<ul style="list-style-type: none"> <li>✓ Pension plan administrator</li> <li>✓ Actuary</li> <li>✓ Custodian</li> <li>✓ RRSP/LIRA/RRIF custodian</li> <li>✓ RESP custodian</li> <li>✓ College savings plan administrator</li> <li>✓ Social Security Administration</li> <li>✓ Human Resources Development Canada (Canada Pension Plan/Old Age Security)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Insurance agents:                             <ul style="list-style-type: none"> <li>▪ Property/Casualty</li> <li>▪ Disability</li> <li>▪ Long-term care</li> <li>▪ Health</li> <li>▪ Life</li> </ul> </li> <li>✓ Social Security Administration (Medicare)</li> <li>✓ Provincial Healthcare provider</li> </ul>	<ul style="list-style-type: none"> <li>✓ Estate planning attorney</li> <li>✓ Charities</li> <li>✓ Trust administrator</li> <li>✓ Estate/gift/trust tax accountant</li> <li>✓ Custodian</li> <li>✓ Trustee</li> </ul>	<ul style="list-style-type: none"> <li>✓ Stock broker</li> <li>✓ Mutual fund manager/company</li> <li>✓ Brokerage firm</li> <li>✓ Investment manager</li> </ul>	<ul style="list-style-type: none"> <li>✓ Immigration attorney</li> <li>✓ Immigration &amp; Naturalization Service</li> </ul>	<ul style="list-style-type: none"> <li>✓ US Customs</li> <li>✓ Canada Customs</li> <li>✓ Moving Company</li> </ul>