

YourStyle

FINANCIAL

WHAT ARE YOUR PRIORITIES?

LIFESTYLE

- Financial lifestyle
- Do retirement assessment
- Fulfill income needs
- Protect savings
- Make money grow
- Finance significant purchase

FAMILY

- Protect family
- Finance children's education
- Finance vacation
- Assist parents

HOME/PROPERTY

- Finance home
- Renovate home
- Purchase cottage/vacation property
- Finance income property
- Protect home or property

CAREER/BUSINESS

- Protect ability to work
- Provide business succession
- Protect family
- Protect assets
- Take sabbatical

TAXES

- Pay less tax
- Generate tax refunds
- Choose tax-efficient investments

LEGACY

- Protect loved ones
- Gift loved ones
- Pass on assets
- Plan charitable giving

ANXIETIES

- Not having enough money
- Losing capital
- Starting plan too late
- Market ups and downs

SUBMIT

YourStyle Financial

1-B 2020 Portage Avenue
Winnipeg, MB R3J 0K4

P: 204 474 2929
TF: 877 895 3258

www.yourstylefinancial.ca

Doug Buss, CFP, CLU, CP CA

C: 204 227 6395
E: doug@yourstylefinancial.ca

Lindsay Boychuk, BPE, BSc, RD

C: 204 232 9093
E: lindsay@yourstylefinancial.ca

Dwain Ste. Marie, B.Comm (Hons)

C: 204 479 6798
E: dwain@yourstylefinancial.ca

What's
important
to you