




## Topics for Discussion:

**For:**

**Date:**

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1. Life Insurance Rates, Needs / Policy Review ?
2. Disability / Income Replacement ?
3. Critical Illness, LTC / Return of Premium ?
4. Investment / Portfolio Review ?  (Mutual Fund Dealer)  
[www.PortfolioStrategies.ca](http://www.PortfolioStrategies.ca)
5. Assets & Liabilities / Reduce Debts ?
6. Pension, RRSP, RRIF, GIC, ROC / Retirement Income Planning ?
7. Tax-Free Savings Account / Strategy ?
8. Registered Education Savings Plan / RDSPs ?
9. Manulife One Mortgage / Debt-Free Sooner ?
10. Group Health / Dental, Drug Card, Term Life, Accident / Sickness Disability Income ?
11. Wills, Trusts, Estate Planning / Build, Protect, Preserve Income and Net Worth ?
12. Other? (Home & Auto Insurance, Realtor or Specialty Lawyer Referral Services ?)