

Do your investment priorities reflect your expectations?

Please identify your priorities in order of importance to simplify your investment choices.

1 = Highest priority
6 = Lowest priority

		Deferred Life Annuity	Annuity	GIC	Investment Account	Equity Index GICs
<input type="checkbox"/>	You want your investments to experience rapid growth. Desired return: <input type="text"/> % Your priority is RETURNS.					
<input type="checkbox"/>	You want a stable income with no surprises. Your priority is GUARANTEED INCOME.					
<input type="checkbox"/>	You want access to your funds at all times. Your priority is ACCESSIBILITY.					
<input type="checkbox"/>	You want an easy, effective formula with little management required. Your priority is SIMPLICITY.					
<input type="checkbox"/>	You want to eliminate all risks to your funds. Your priority is CAPITAL PROTECTION.					
<input type="checkbox"/>	You want to reduce the taxes on your non-RRSP portfolio. Your priority is TAX REDUCTION.					

Name of client:

Date: