

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

Name of client: _____

Date: _____

New Form

Comparative Table

We have indicated below the three main features of each solution that reflect your priorities.

	Returns	Guaranteed income	Accessibility	Simplicity	Capital protection	Tax reduction
Deferred Life Annuity		✓		✓	✓	
GIC			✓	✓	✓	
Annuity		✓		✓	✓	
Investment Account	✓		✓	✓		
Equity Index GICs				✓	✓	✓