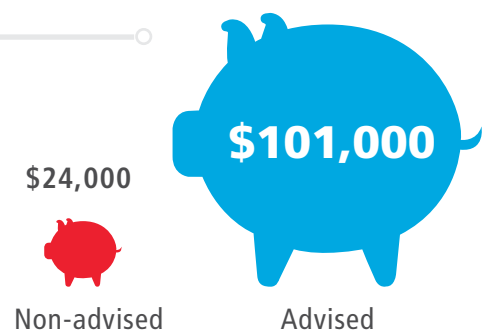


the Value of Financial Advice

Product Recommendations
Access to financial planning tools and resources
Customized Financial Plan
Budgeting
Support through life events and market ups and downs
Referral to tax, estate and insurance professionals

Wealth Accumulation

Investors accumulate **4x** the assets at all income levels¹



Recommend



Value



Trust



Well-being

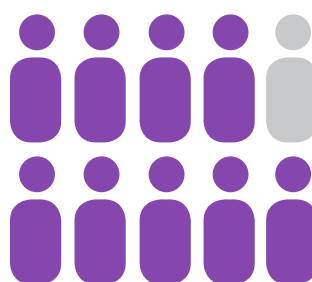
Investors with comprehensive financial plans:⁷

- ☒ feel on track to retire when they want
- ☒ likely to say they have improved ability to save in the last five years
- ☒ confident that they are prepared to deal with financial challenges
- ☒ emotionally and financially content

Better off



Satisfaction



Sources: ¹New Evidence on the Value of Advice, 2012, Dr. Jon Cockerline (IFIC). Advised households have four times the median current financial assets of non-advised households. Figure is for illustrative purposes only and does not reflect future values or future performance of any investment. | ^{2,3,4,5} Advocis, The Financial Advisors Association of Canada, Consumer Voice Survey 2015 – Investor Insights on the Financial Advice Industry, November 2015. | ⁶ The Investment Funds Institute of Canada, Canadian Investors' Perceptions of Mutual Funds and the Mutual Fund Industry, 2015, survey conducted by POLLARA Inc. | ⁷ Financial Planning Standards Council, The Value of Financial Planning, 2012.

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