



Capital Wealth Management

ADVICE | DESIGN | RESULTS

KNOWLEDGE IS WEALTH

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Advisor

Bob Pride CFP, CLU, CH.FC., EPC
Investment and Retirement
planning specialist,
Investment Representative
e. bpride@capital-wealth.ca

Contact Us

501-63 Church St.
St. Catharines | ON L2R 3C4
p. 905.682.5789 ext. 225
f. 905.682.2378
w. capital-wealth.ca

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Do I Need A Financial Plan for my Future?

Do you need a written financial plan for your future? Well, that depends. Let me give you an analogy and perhaps you can answer the question for yourself.

You and your family have decided to go on a vacation this summer. Everyone is excited about getting away and having time off so the entire family loads into the car. You start the car and your son in the back seat asks, "Hey Dad, where are we going?"

You look around, and then answer, "I'm not really sure son, but when we get there, I'll let you know." You then proceed to the nearest main highway entrance driving somewhat aimlessly.

Does this sound like the normal process to guarantee yourself and your family a worry free and enjoyable vacation?

More realistically speaking, it is likely you have spent hours discussing ideas with your family. You have searched the internet for information, consulting with travel agents or perhaps your local CAA office for trip information and best routes. You would have your road map handy and most likely, hotel stops along the way booked well in advance. Most certainly, you would know where the final destination is and have some thoughts about what to do when you get there.

Why is it then, that when it comes to planning a financial destination, that many people have no idea where they

are going, how to get there or have a clear focus on what it is they really want?

As the saying goes, if you fail to plan, you plan to fail.

At Capital Wealth, we strongly recommend that you take the time to talk with us and develop a financial roadmap. This roadmap gives you peace of mind knowing that you are working towards your dream destinations. This could mean a comfortable retirement, providing funds for education for your children, starting your own business, buying your dream home or as a senior, ensuring your estate is passed on to your children and grandchildren in the most tax effective way possible.

Whatever your dreams and goals are, we are anxious to help you. Give us a call for professional advice using our unique processes and we will work with you to create your plan!

