

Life Comes at Us...Fast

FAMILY MEMBERS	AGE	5 YEARS	10 YEARS	15 YEARS	20 YEARS	25 YEARS	30 YEARS

Adapted from: John D. Gresham - http://greshamcompany.com/_vti_bin/shtml.exe/tools.html

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SAMPLE

FAMILY MEMBERS	AGE	5 YEARS	10 YEARS	15 YEARS	20 YEARS	25 YEARS	30 YEARS
Jeff	55		RETIREMENT				
Rhonda	49			RETIREMENT			
Kathleen	14	EDUCATION FUNDING					
Daniel	12				HOME FINANCING		INHERITANCE
Mother	85	LONG-TERM CARE					
In-Laws	70s			LONG-TERM CARE			

This chart can be used as a visual aid to help clients identify what issues and needs their family may face in the future. Once the client has completed the chart, review and discuss with them to show how your services can be utilized to support their planning needs - now and in the future.

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Canada's Investment Company