



Living Desired Lifestyle

Values, Beliefs, Goals, Objectives

Client (Spouse, Children, Family, Relatives, Friends)

Transition Financial Advisors

Cash Management Planning	Income Tax Planning	Independence/ Education Planning	Risk Management	Estate/ Charitable Planning	Investment Planning	Immigration Planning	Customs Planning
<ul style="list-style-type: none"> ✓ Mortgage broker ✓ Banker ✓ Currency exchange firm ✓ Realtor ✓ Auto Dealer 	<ul style="list-style-type: none"> ✓ US Accountant (CPA) ✓ Cdn Accountant (CA) ✓ Bookkeeper ✓ Tax Attorney (Cdn, US) ✓ Canada Revenue Agency ✓ Provincial taxing authority ✓ Internal Revenue Service/US Dept. of Treasury ✓ State taxing authority 	<ul style="list-style-type: none"> ✓ Pension plan administrator ✓ Actuary ✓ Custodian ✓ RRSP/LIRA/RRIF custodian ✓ RESP custodian ✓ College savings plan administrator ✓ Social Security Administration ✓ Social Development Canada (Canada Pension Plan/Old Age Security) 	<ul style="list-style-type: none"> ✓ Insurance agents: <ul style="list-style-type: none"> • Property/ Casualty • Disability • Long-term care • Health • Life ✓ Social Security Administration (Medicare) ✓ Provincial Healthcare provider 	<ul style="list-style-type: none"> ✓ Estate planning attorney ✓ Charities ✓ Trust administrator ✓ Estate/gift/trust tax accountant ✓ Custodian ✓ Trustee 	<ul style="list-style-type: none"> ✓ Stock broker ✓ Mutual fund manager/company ✓ Brokerage firm ✓ Investment manager 	<ul style="list-style-type: none"> ✓ Immigration attorney ✓ US Citizenship & Immigration Services 	<ul style="list-style-type: none"> ✓ US Customs ✓ Canada Customs ✓ Moving Company