

Financial Planners Standards Council



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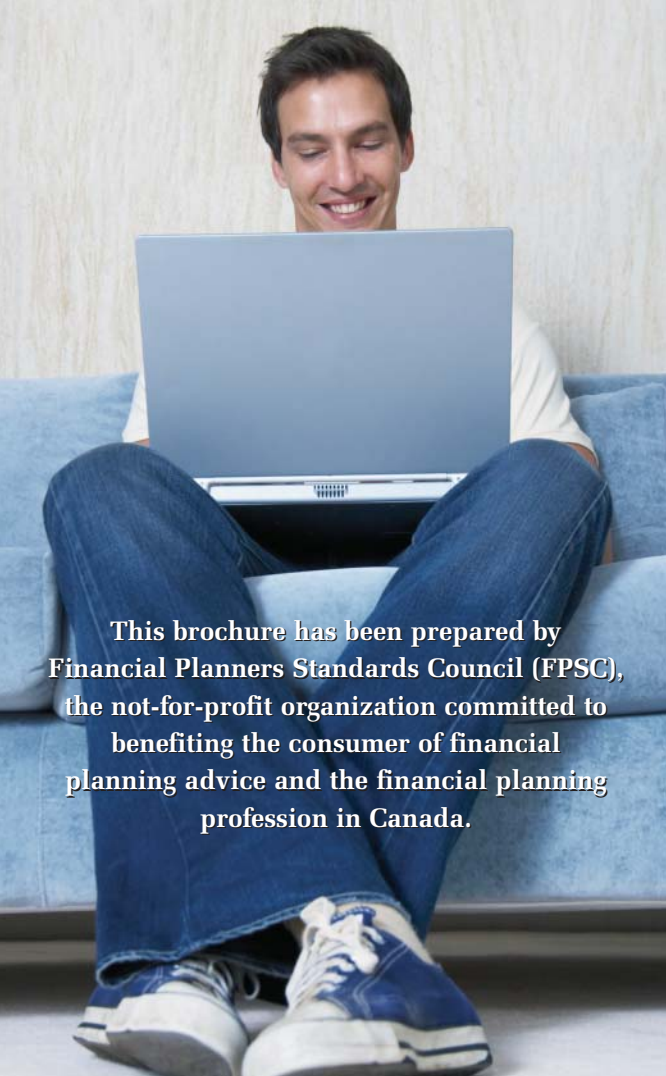
“Do I need help  
with my financial  
planning?”

**Take our self-test to find out.**



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Don't think about it too much. Read and react to the following 10 statements.



This brochure has been prepared by Financial Planners Standards Council (FPSC), the not-for-profit organization committed to benefiting the consumer of financial planning advice and the financial planning profession in Canada.

1 “I understand the tax implications of my decisions. I pay a lot of tax.”

AGREE  DISAGREE  NOT SURE

2 “I sleep well at night knowing my money is working as hard as I am.”

AGREE  DISAGREE  NOT SURE

3 “Insurance? Yeah, I understand it – sort of.”

AGREE  DISAGREE  NOT SURE

**4** “How hard can it be? I’ve got the time and skills to put my own financial plan together.”

AGREE  DISAGREE  NOT SURE



**5** “I have money saved for what I know and don’t know will happen.”

AGREE  DISAGREE  NOT SURE



**6** “I know there is a difference between good debt and bad debt.”

AGREE  DISAGREE  NOT SURE

**7** “I know what my financial legacy will – or must be.”

AGREE  DISAGREE  NOT SURE



**8** “Retirement?  
Absolutely.  
Just don’t ask me  
when or how.”



AGREE



DISAGREE



NOT SURE

**9** “I know the  
precise value of  
what I own.”



AGREE



DISAGREE



NOT SURE

**10** “Maybe I  
could use a little  
help from a professional  
financial planner.”



AGREE



DISAGREE



NOT SURE

Ask your CFP professional  
for information on how  
financial planning can help  
you or visit [www.cfp-ca.org](http://www.cfp-ca.org)

