PERSONALIZED INVESTMENT PLANNING INC.
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CLIENT SERVICE CHECK LIST

We recognize that over time that products change as do government rules and regulations, therefore we feel it is important to ask questions relative to the changing economic and financial products environment:

1. When is the last time you reviewed your insurance coverage?
2. Are you eligible for non-smoker rates?
3. Are you currently satisfied with your RRSP Program?
4. Has anybody ever discussed estate planning with you?
5. Do you take advantage of tax sheltering opportunities?
6. Is there anything else we can do for you, i.e. Creditor proofing your RRSP Assets and or reducing your exposure to probate fees?

The answers to these questions could save you thousands of dollars today and potentially a $100,000 plus over your lifetime.

Please take the time to read them through and if there are any questions or concerns that you have, please feel free to ask.

Michael Gentile, B.A., C.L.U., CH.F.C., C.F.P.
CHARTERED FINANCIAL CONSULTANT