



Am I okay?

Including content developed by



The Farwell Group

ScotiaMcLeod, a division of Scotia Capital Inc.

Scotia Wealth Management.

AM I OKAY?

A common worry people have during times of change is simply, am I okay? Will I have enough cash flow to cover my expenses and get through this? This tool is designed to help you bring order and clarity to your financial situation.

Through working together, we aim to increase your overall confidence as you navigate your journey forward. Should you wish to talk through this tool, please contact our team at farwellgroup@scotiawealth.com.

STEP ONE:

Make a list of all possible sources of income.

SOURCES	AMOUNT
Business income	
Employment income	
Canadian Pension Plan (CPP)	
Old Age Security (OAS)	
Investments	
Registered investments (RRSP, TFSA, RRIF, LIRA, etc.)	
Royalties/commissions	
Employee benefits	
Family	
Trust income	
Other	
Other	
Total	

STEP TWO:

Make a list of all sources of available cash that you can access.

SOURCES	AMOUNT
Savings or chequings accounts	
Registered accounts (RRSP, TFSA, RRIF, LIRA, etc.)	
Investment accounts	
Insurance policies (death benefit)	
Annuities	
Family	
Home equity	
Other	
Other	
Total	

This information is the foundation for creating your personal plan to achieve control over your income and clarity around the lifestyle you can sustain.

For more information and other helpful resources, please contact our team at 416.860.1715 or by emailing farwellgroup@scotiawealth.com.

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