



# Managing expectations

Including content developed by:



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The Farwell Group

ScotiaMcLeod, a division of Scotia Capital Inc.

**Scotia** Wealth Management.



## QUESTIONS TO ASK FOR CRAFTING A PERSONAL STATEMENT

Who else is involved in this process?

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How will important relationships be impacted? What needs to be done to protect relationships?

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What are your sources of advice, professional and personal?

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Are these entities you feel need to be included?

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How will you test the financial impact?

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How will you handle push back or pressure you get when you delay or refuse to meet an expectation?

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### NOTES



## SAMPLE STATEMENT

*"I'm working with a financial professional - who is trained to help widows like me.*

*The first step I've taken is to agree to not make any unnecessary decisions until I've gone through a process of organizing, figuring out what's possible, and looking into different ways to manage my resources.*

*Once I get through this first phase, I will review your suggestion/request and see how it fits. Right now, we just don't know what will be possible. I'm not ready to make a decision on anything that's not absolutely essential.*

*Managing this loss is difficult. I'm relieved to be going slowly in the beginning."*

What is your goal or objective for managing expectations?

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What should be in your statement?

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Issues that should be addressed:


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Feelings that need to be considered:

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## YOUR STATEMENT

**For more information and other helpful resources, please contact our team at 416.860.1715 or email: [farwellgroup@scotiawealth.com](mailto:farwellgroup@scotiawealth.com)**



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