

Managing expectations

Including content developed by:



The Farwell Group ScotiaMcLeod," a division of Scotia Capital Inc.

Scotia Wealth Management.

ASSUMPTIONS AND EXPECTATIONS

WHAT	WHEN	WHY

EXPECTATIONS OF OTHERS

₩НΟ	WHAT	WHEN	WHY	HOW I FEEL

QUESTIONS TO ASK FOR CRAFTING A PERSONAL STATEMENT

Who else is involved in this process?

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

What are your sources of advice, professional and personal?

Are these entities you feel need to be included?

How will you test the financial impact?

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

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."

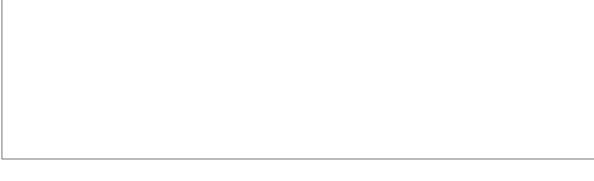
What is your goal or objective for managing expectations?

What should be in your statement?

Issues that should be addressed:

Feelings that need to be considered:

YOUR STATEMENT



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

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