

It All Starts with a Plan



*signature*

**FINANCIAL SECURITY**

Mike Robinson, Principal  
Phone (403) 226-0321

# You're a forward thinker

You have to be. As a successful business owner, you know only too well what can happen if you aren't constantly planning and thinking ahead. You've been running your own business for some time now and have experienced both the highs and the lows. Lately, business has been good and you have built yourself a sizable nest egg.

You can't help but think that retirement isn't that far away. While you may not be looking to completely divorce yourself from your business, you sure would like to know that you can if you want to.

*While you may not be looking to completely divorce yourself from your business, you sure would like to know that you can if you want to.*

You'd also like to make sure you're going to be alright if there is another lull in the economy. Maybe you have your eye on a second home or want to do some traveling. Whatever your retirement looks like, the burning question you want answered is:

## **Will I have enough money to do what I want 5 - 10 years from now?**

Of course, you know you will do OKAY, but the last thing you want, is any preventable surprises! You want to make sure you structure things to minimize future tax repercussions. You want to make sure your family will be fine should anything happen to you. Most importantly you want to do better than just OKAY in your retirement years!

## **You need more than an Investment Plan**

While you definitely want to know how to best structure your investments, you need more sophisticated advice than this. You need complete wealth management to make sure you minimize fees, watch the tax implications, and also take into account property values, inflation, sale of business impact and much more. Your plan should be comprehensive and account for as many contingencies as possible.

## **It all starts with the plan**

**Everyone wants to promote something to you –high performing investments, tax reduction strategies, estate building ideas, etc. Some of them may be great ideas but should never be implemented without a plan first. It all starts with the plan. Visit us at [www.signaturefs.ca](http://www.signaturefs.ca) to see The Signature Difference.**

## **Free Financial Planning Tips**

Visit our website at [www.signaturefs.ca](http://www.signaturefs.ca) and sign up to receive *The Signature Line*, which is a quarterly e-mail update on what's happening in the markets with direct commentary on how it might be affecting you or your financial plan.

When you subscribe, you will receive a free copy of our latest report "What the \$1 Million Investor Should Know" authored by our firm's principal, Mike Robinson.



## **The Signature Difference**

When working with Signature Financial Security you are working with the team that other financial professionals turn to for their own advice. Prior to founding Signature

Financial Security, Mike Robinson served as a Private Wealth Counselor, which is the role of the "advisor to the advisor." Mike worked as a consultant and educator to some of the best financial advisors in the business in helping those advisors with their affluent client practice. Among our clientele, Mike advises a PhD in Investment Finance, an executive with the Alberta Securities Commission as well as a retired financial advisor.