



FAMILY WEALTH PLANNERS
PERSONAL TAX ADVISORS
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Market Investments and Financial Products

	Tax Effective	Purpose		Capital Protection	Income Certainty	Inflation Protection
		Growth	Income			
Market Investments						
Growth/Income						
Cash				✓		
Stocks	✓	✓				
Bonds			✓		✓	
Guaranteed Investment Certificates			✓	✓	✓	
Real Estate /Reits	✓	✓	✓			
Financial Products						
Guaranteed Income						
Annuities			✓		✓	✓
Segregated Funds			✓	✓		
Prescribed Annuities	✓		✓		✓	✓
Insured Annuities	✓		✓	✓	✓	✓
Pensions			✓		✓	✓
Reverse Mortgages	✓		✓		✓	
Income Protection or Deferment						
T Series Mutual Funds	✓		✓			
Corporate Class Mutual Funds	✓		✓			
Capital Protection						
Indexed Linked GICs			✓	✓		
Principal Protected Notes				✓		
Strip Bonds	✓	✓		✓		