

# *ur Financial Vision*



*e have worked hard and planned carefully and we know we can retire with enough money to support our lifestyle but we are still apprehensive about retirement. hile we may not retire right away, we want to start transitioning soon to help us become more comfortable with the concept of retirement.*



*e have several options when it comes to where we spend our time during retirement. e have properties in the Okanagan and in Calgary. e want to leave our options open, but would also like to determine what our retirement will look like over the next few years.*



*e would like to travel and enjoy seeing more of the world. e may wish to travel to Barbados, but would not look to travel that much throughout the United States. e want to be able to take these trips as long as we are able to, and want to make sure that travel is reflected in our retirement plan.*



*e enjoy skiing and other outdoor activities and want to take more time to enjoy these activities. This may be a great way for us to transition into our retirement years, whenever that day may be. Brian may seek to become more serious about golfing and enjoy more summer outdoor activities*



*Our family is important to us and we are proud of the lives they have built for themselves. e want to be able to support our children and grandchildren when we can, and we will assess our estate plans with them in mind in the coming years.*



*e are proud of our history of service to various societies, boards and church groups. e may seek to continue volunteering with different organizations and we have included charities in our wills to make sure that they can continue doing their good work.*