

Wealth Themes

For Baby Boomers, Is Time On Their Side

If you're a baby boomer (born between 1946 and 1964), or are close to someone that is, it means considering a new set of circumstances as you approach or enter retirement. For this edition, we're providing articles to help 'boomers' strengthen and protect their financial position in the face of age-related risk.

Protecting Baby Boomers from Increasing Risk

This article outlines the most essential steps forward boomers can take to ensure their intended transfer of wealth and property; namely, by developing an estate plan, safeguarding from the impact of life threatening illness and communicating intentions to family members and other loved ones.

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The Impact of Sequence of Returns on Your Retirement Portfolio

This article introduces the concept of 'sequence of returns' risk, which involves the detrimental impact market volatility can have on capital as you begin drawing down on accumulated assets near the beginning of retirement.

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Registered Retirement Income Funds

Boomers nearing retirement, especially those approaching 71, must consider an RRSP maturity option. This article provides an overview of Registered Retirement Income Funds (RRIFs) and the minimum annual RRIF withdrawal percentages, which were reduced in the April 2015 Federal Budget.

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2016 Wealth Planning Facts & Figures

This helpful resource summarizes important tax, retirement and estate planning information, and has been recently updated with important information for 2016.

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Please don't hesitate to contact the office if you have any questions about these articles or would like to discuss your portfolio.



Featured Publications

- [Protecting Baby Boomers from Increasing Risk](#)
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