

THE IMPORTANT VALUE OF FINANCIAL ADVICE



**HOUSEHOLD WITH
FINANCIAL ADVICE**

vs

**HOUSEHOLD WITHOUT
FINANCIAL ADVICE**

1.8x More Financial Assets After 4-6 Years

2.1x More Financial Assets After 7-14 Years

2.3x More Financial Assets After 15 Years

Source: More on the Value of Financial Advisors, Claude Montmarquette, Alexandre Prud'Homme, CIRANO 2020.



Protecting against poor financial decisions



Selecting tax-efficient investment vehicles



Building assets for a more comfortable retirement



Avoiding emotional investing habits



Maintaining a long-term investment strategy



Accumulating wealth through better saving



Building a resilient portfolio

We encourage you to schedule an appointment with your Financial Advisor at least annually to review your portfolio.

Your participation is required in order for your advisor to assist you with your financial goals and objectives.

If you require further information/assistance, please do not hesitate to contact your financial advisor at Shah Financial Planning Inc. • Info@ShahFinancial.ca

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