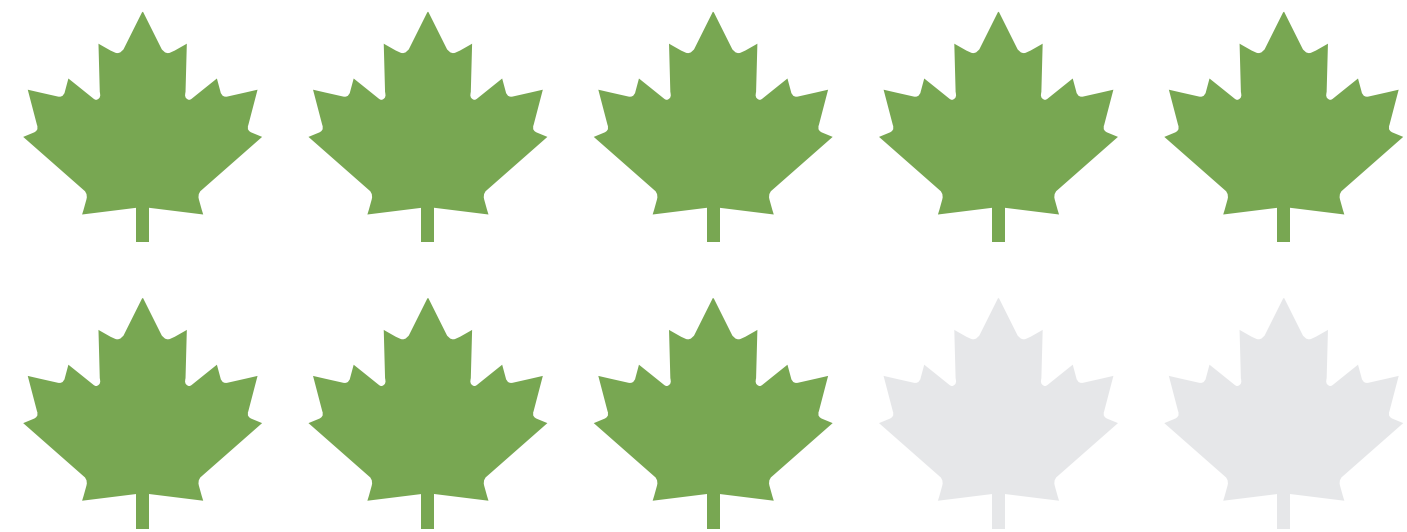
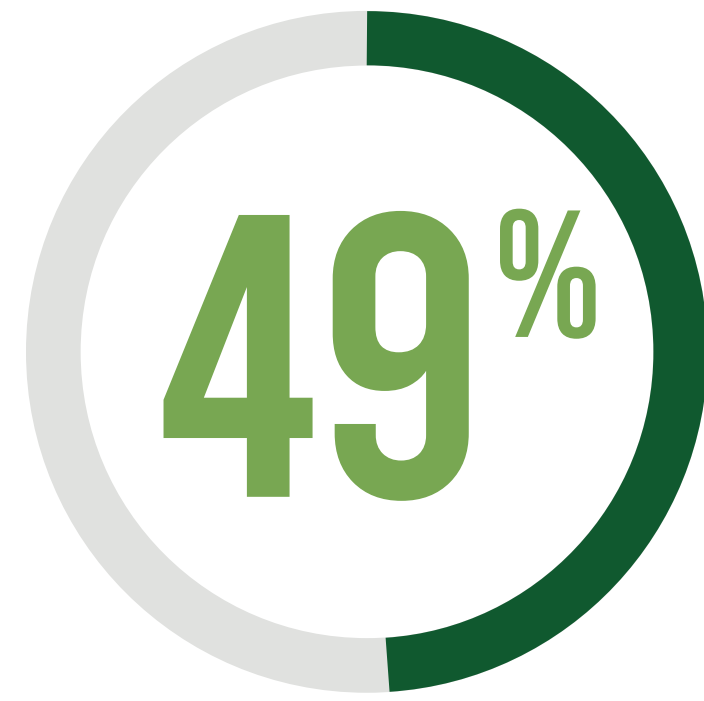

Has the
pandemic
changed
your financial
priorities?



8/10 Canadian
investors say
“YES.”



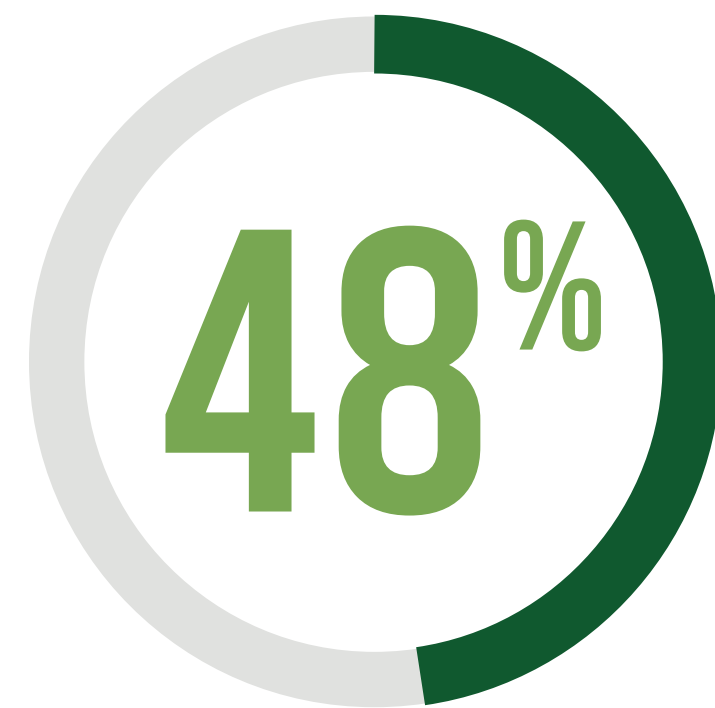
If there's one thing this year has shown us, it's how life can change on a dime. In a recent poll¹, we found that COVID-19 has left many Canadians reevaluating their financial priorities. Investors are adapting to their new reality by focusing more on their retirement savings, income stability, and short-term cash flow compared to before the pandemic began.



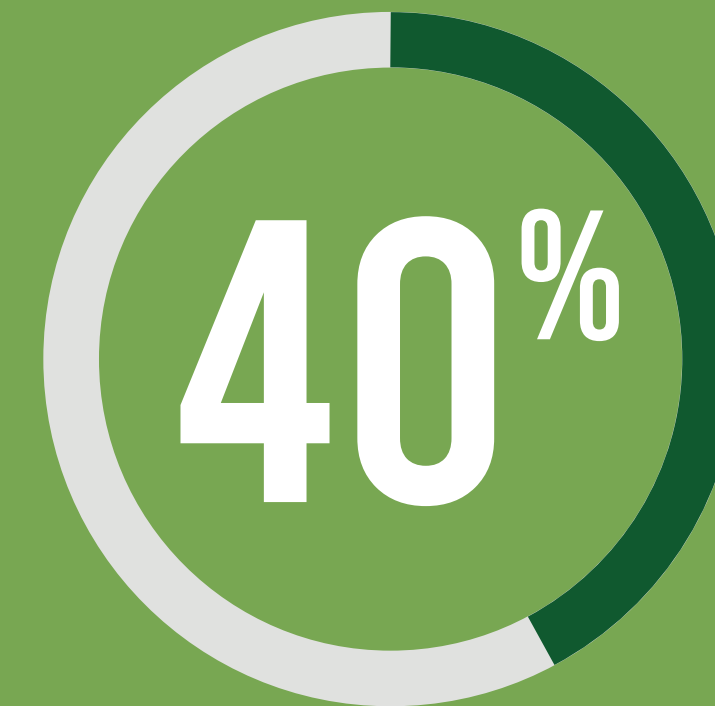
SAY RETIREMENT SAVINGS HAS BECOME MORE IMPORTANT



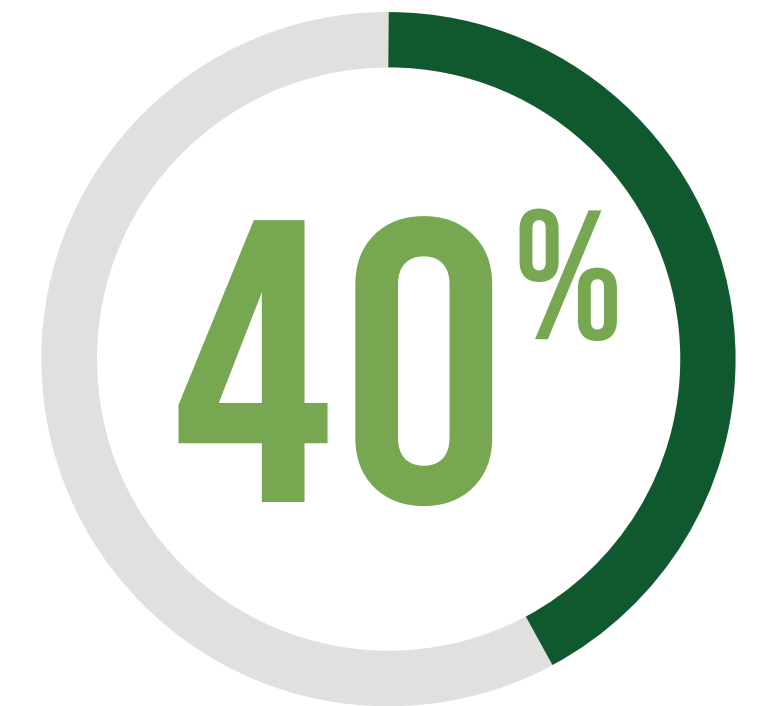
HAVE MODIFIED A LONG-TERM GOAL THAT'S NOW OUT OF REACH



REPORT STABLE INCOME AND SHORT-TERM CASH FLOW ARE NOW HIGHER PRIORITIES



PLACE MORE IMPORTANCE ON JOB SECURITY



ARE CONCERNED THEY'LL OUTLIVE THEIR MONEY



Support when it's needed

Whether it's a job loss, cancelled wedding celebrations or delayed travel plans, there may be significant repercussions to one's personal or family finances. An advisor can help you evaluate your options to make informed decisions.

Canadians recognize the value that their advisors provide and are managing their financial situations by seeking personalized advice.

33%
OF INVESTORS

**INCREASED THEIR FREQUENCY OF
COMMUNICATION WITH THEIR ADVISOR
SINCE THE PANDEMIC BEGAN.**



What people look for in an advisor

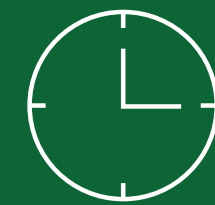
Advisors can have a positive impact on the lives of their clients, and different investors see different advantages when working with a financial advisor. The top three reasons² for having a financial advisor are to:



ensure their investments withstand market volatility



stay on top of their financial situation



receive timely financial information and education

Evaluate:
Top 10 Questions to Ask Yourself

Click to evaluate if working
with an advisor is right for you





Beyond the tangible benefits of advice, Canadians also say they want advisors who are:



ENGAGED



WANT TO WORK WITH SOMEONE WHO KNOWS THEIR PERSONAL SITUATION

FLEXIBLE



SAY THE ABILITY TO CONNECT WITH THEIR ADVISOR ONLINE IS INCREASINGLY IMPORTANT.

There are many financial life decisions that can be difficult to navigate alone. These include when to shift your investment strategies, how to save tax while retired, dealing with your children's college education costs, estate planning and much more.



If the current environment has you re-evaluating your financial priorities, you're not alone.

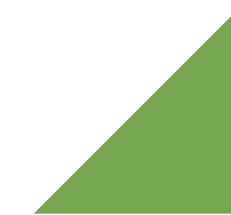
74%
OF CANADIANS

**ARE INCREASINGLY SEEKING OUT
FINANCIAL ADVICE TO GUIDE THEM
THROUGH THE UNCERTAINTY**

The reduced barriers for accessing expert advice means the answers to your concerns are only a phone call or virtual meeting away.

START A CONVERSATION

with an advisor to see where your opportunities lie.





¹The study was conducted August 13 – August 27, 2020, in partnership with Environics Research with results drawn from an online sample of 1,000 Canadian investors with \$100,000 or more in investible assets that are 30 years old. ² Based on an IPC survey of 500 investors with over \$100,000 in investible assets. Survey conducted by Environics Research Group, April 2019. Investment Planning Counsel Inc. is a fully integrated wealth management company. Counsel Portfolio Services is a wholly-owned subsidiary of Investment Planning Counsel Inc. Trademarks owned by Investment Planning Counsel Inc. and licensed to its subsidiary corporations. Mutual Funds available through IPC Investment Corporation and IPC Securities Corporation. IPC Private Wealth is a division of IPC Securities Corporation. IPC Securities Corporation is a member of the Canadian Investor Protection Fund.