

# Linking People with Priorities

AGF SOUND CHOICES

Identify the key people in your live(s) and their ages. This will help identify points in time that will impact your finances.

Today is: _____		Today	5 Years from today	10 Years from today	15 Years from today	20 Years from today	25 Years from today	30 Years from today	35 Years from today
<b>Name</b>									
You	Age								
Spouse	Age								
Relative	Age								
Relative	Age								
Relative	Age								
Relative	Age								
Relative	Age								
Business Partner	Age								
Other	Age								
Other	Age								
Other	Age								
Other	Age								

# Who might impact your priorities and when?

Today is: \_\_\_\_\_

	Potential priorities	Potential conflicts	Potential opportunities
5 years from today			
10 years from today			
15 years from today			
20 years from today			
25 years from today			
30 years from today			
35 years from today			

For tips on working with a financial advisor, visit [AGF.com/InvestorEducation](https://www.agf.com/InvestorEducation).

This material is for informational and educational purposes only. It is not a recommendation of any specific investment product, strategy, or decision, and is not intended to suggest taking or refraining from any course of action. It is not intended to address the needs, circumstances, and objectives of any specific investor. This information is not meant as tax or legal advice. Investors should consult a financial advisor and/or tax professional before making investment, financial and/or tax-related decisions.

©™ The "AGF" logo and all associated trademarks are registered trademarks or trademarks of AGF Management Limited and used under licence.