

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
Name								
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).

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