CINDY BOURY FCSI®, CIM®, FMA
Portfolio & Branch Manager

CINDY BOURY PRIVATE WEALTH MANAGEMENT

CLIENT'S GOALS

Please check the three items that are the most important to you:

- ☐ Having enough income during retirement.
- ☐ Purchasing a retirement property or secondary residence.
- ☐ Providing for education of children or grandchildren.
- ☐ Making sure my family will be secure in the event of a catastrophe, i.e., death or disability of a breadwinner.
- ☐ Restructuring or eliminating debt.
- ☐ Passing my estate to my heirs smoothly without the need for court intervention.
- ☐ Protecting my estate from taxes and transfer costs.
- ☐ Providing a legacy and financial resource for successor generations.
- ☐ Position myself to enjoy more of the things in life I value.
- ☐ Providing capital for the charitable organizations I support.
- ☐ Avoiding capital gains or excessive taxes on the sale of business interests or investments.
- ☐ Determining where or how to withdraw funds from investments to provide for my retirement income.
- ☐ Reducing the income taxes that are generated from my investments.
- ☐ Having a complete review of my investment portfolio to see my returns and what risk I have been taking.
- ☐ Having someone study my investment portfolio and make a recommendation on what type I should have.
- ☐ Protecting my assets from creditors and liability law suits.
- ☐ Knowing where to put old and new investments to maximize tax efficiency and meet future liquidity needs.
- ☐ Having peace of mind and a sense of security regarding my financial future.

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