

# The Value of Financial Planning.

**Consumers are challenged by their finances.**



**Only 18%**  
of Canadians **strongly agree** that they're **very knowledgeable** about financial matters.



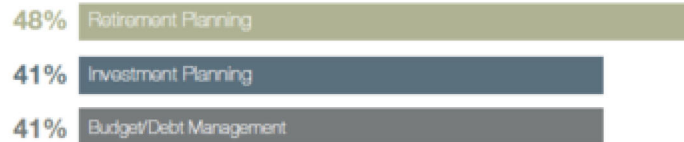
**7 in 10**  
Canadians don't have a **comprehensive, written financial plan.**

Consumers are focused on:

- Being Debt Free
- Being Prepared For An Emergency
- Owning A Home
- Planning For Retirement
- Managing Their Own Finances
- Supporting Others Financially
- Managing Investments



Canadians would seek these services from a financial professional:



**8 in 10 Canadians**

don't feel highly confident they'll achieve their financial goals

*and*

don't feel very successful at sticking to their financial strategies



**TRUST IS THE #1 BARRIER**

to Canadians participating in the financial planning process

*and*

**the #1 factor** in considering who to choose as their financial advisor