



Financial Planning Pyramid

It's important to plan for your financial future. If you're not sure how to plan ahead, take a look at the Financial Planning Pyramid.

This widely accepted and simple tool can help you create a financial plan that is built on a solid foundation. The pyramid illustrates which financial matters you should address first: debt reduction, insurance needs, a properly drawn will and an emergency fund.

As you move up the pyramid (by reducing debt and acquiring assets), your income protection needs are replaced by your need to accumulate more wealth.

Ask your advisor to help you plan ahead using the Financial Planning Pyramid.

