

Possible Topics for Future ShareClub Meetings

(Updated Sep 2012)

Please check off ✓ the topics that are of particular interest to you and return with your membership sign up form.

| Topics | ✓ |
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| Exchange Traded Funds (ETFs) | |
| General Economic issues (US dollars, global markets, etc.) | |
| RSP planning regarding withdrawals, RIF, OAS clawbacks, tax issues... | |
| Choosing a Financial Planner - methods, costs, designations, roles | |
| Best financial websites including portfolio tracking services | |
| Registered Education Savings Plans (RESP) | |
| Financial "cons" - how to spot them, why they are successful, who is susceptible... | |
| Overall long term financial planning/strategies (home purchase/rental, insurance, emergency funds, education savings, wills...) | |
| Role of risk in any investment decisions and methods of gauging or understanding risk | |
| Asset Allocation | |
| Review of selected articles from Canadian Moneysaver | |
| The ability (or inability) of specialists to accurately predict economic and/or financial conditions - are they reliable? | |
| Inflation - how does it affect your lifestyle and your investment decisions? | |
| US and other country debt problems and likely impact on Canadians | |
| Investment fees - impact on investment performance | |
| Investor Psychology - how many ways can you become a loser? | |
| Investing Abroad/Currency Risk | |
| Spouse Night (What is the minimum that the non involved spouse needs to know about the family financial/investment status?) Bring your spouse! | |
| Book review - recommendations from members on books and articles | |
| Portfolio styles and objectives | |
| Fixed income investing | |
| Estate planning | |
| Technical analysis | |
| Use of insurance (including longevity insurance) | |

Add more topics

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| Your Name: (optional) | |

| Life Event Topics | ✓ |
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| Getting a new job - Find out how to make the most of your income and benefits. | |
| Buying a car - How and where do you get the best deal? Should you buy an extended warranty? | |
| Raising a family - Raising kids can be rewarding but can pose many financial challenges. How should you deal with adult children? | |
| Planning for retirement - What resources can you employ to assist you in your preparation for retirement? | |
| Critical illness - The financial impact of critical illness can be as severe as the physical and emotional strain | |
| Death and dying - With a proper will and estate plan, you can prevent a lot of big problems after you're gone. What are the implications of a living will? | |
| Preventing fraud - Know how to spot a scam, and what to do if you fall victim. | |
| Losing a job/income - What resources are available to you in case you ever lose your job/income? | |
| Buying a home - Know the resources that are available to you that will assist you in making the right decisions. | |
| Getting divorced - Your finances could change significantly after a divorce— especially if you have children. How can divorce potentially affect a retired couple? | |
| Living your retirement - Develop a plan for making your retirement savings last. | |
| Caring for a loved one - Caring for a loved one can be hard emotionally and financially. Plan ahead and know where to get help. | |
| Inheriting money - Investing inherited money can help you reach your financial goals, but using it wisely starts with a solid plan. | |

Add more topics

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| Your Name: (optional) | |

****Please check mark your preferred topics and return with you Membership form****

Thank you for feedback!