



IRONSHIELD™

FINANCIAL PLANNING



Comprehensive and Complete FINANCIAL PLANNING

The KAIZEN Financial Planning

Process™ is an evolutionary approach to financial planning. It was created to encompass all key areas of your financial life – simplifying the often complex aspects of wealth accumulation and preservation – over a lifetime.



FundEX
INVESTMENTS INC.

Mutual Funds provided through
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Constant and Never Ending Improvement

Through **The KAIZEN Financial Planning Process[™]** we help our clients achieve their financial goals, today and in the future. The process begins by selecting a program that best meets **your** specific needs and **your** current situation. From there, we work to gain a deeper understanding of the issues that matter most to you, and work with you to gather all the details of your assets, liabilities and objectives. We then design a plan that is customized to those specifics, and periodically re-visit it to compare it to the results achieved. This on-going process of review and adjustment allows us to identify and address areas needing improvement and to stay on track with your evolving financial goals.

IRONSHIELD Financial Planning can help you determine the best course of action for a wide variety of financial questions or concerns.

Your Retirement Plan

"Will I be able to retire at age ___ with the retirement income I desire?"

Your Investment Plan

"Is my investment portfolio properly diversified?"

Your Education Plan

"Will I have enough money to pay for my child's post-secondary education?"

Your Insurance Plan

"Do I have the right amount/right kind of insurance?"

The Wealth Protection Plan[™]

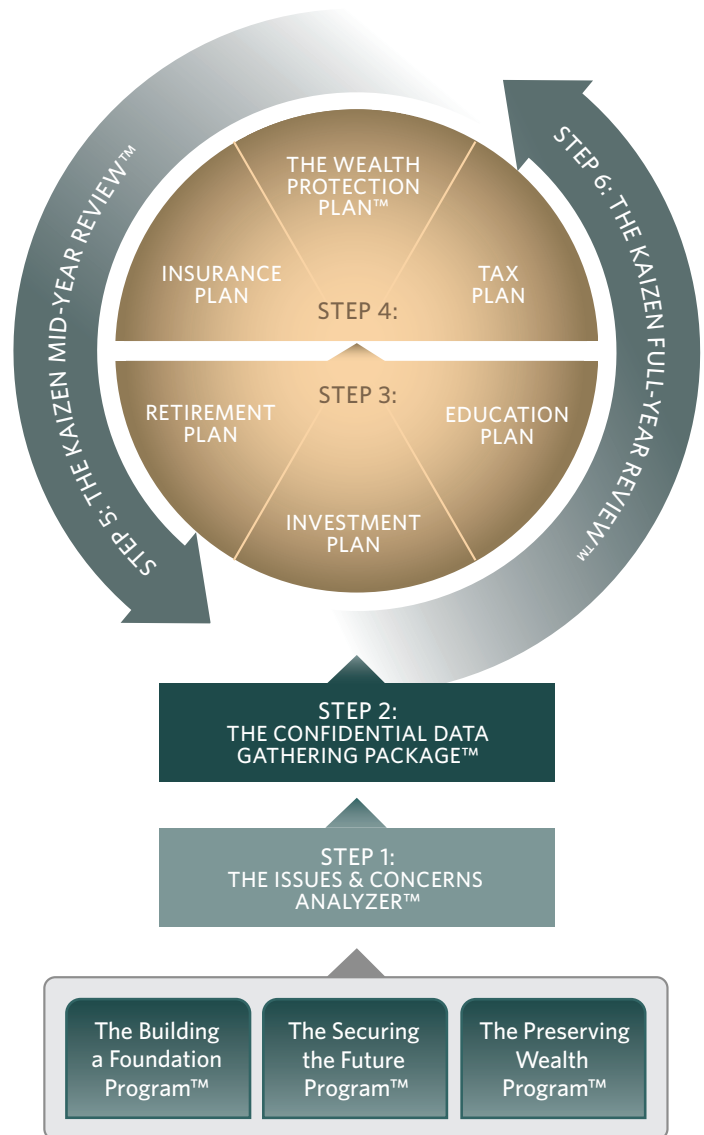
"How do I preserve the value of my estate, and ensure that it's passed on as I wish?"

Your Tax Plan

"Am I paying the least amount of tax required by law?"

IRONSHIELD Financial Planning will work with your team of existing advisors (such as lawyers, accountants, bankers and others) to help you coordinate the key areas of your financial life, resulting in a clearer overall picture. We provide a wide range of professional resources to assist you. Our professional relationships include:

- **Experienced Investment Counselors**
- **Top-Tier Insurance Companies**
- **And many more!**



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