SURVEY CATEGORIES

Investment Planning

- General Investment Planning
- Portfolio Objectives
- Portfolio Analytics
- Use of Investment Policy
- Aggregation
- Tax Optimization
- Client Reporting
- Rebalancing
- Guaranteed Minimum Products

Tax Planning

- General Tax Planning
- Personal Income Tax
- Corporate Tax
- Capital Gains Harvesting

Estate Planning

- General Estate Planning
- Will Review
- Estate Distribution Analysis
- Succession Planning
- Charitable Giving
- Estate Taxes
- Gifting
- Power of Attorney for Property Review
- Power of Attorney for Personal Care Review

Insurance Planning & Risk Management

- General Insurance & Risk Management
- Needs on Death
- Needs on Disability
- Critical Illness
- Long Term Care
- Term vs. Permanent Insurance
- Property & Casualty Insurance
- Key Man
- Buy-Sell
- Pricing

Cash Flow & Liability Management

- Real Estate/Mortgages
- Debt Management
- Lending Metrics
- Income Profile
- Savings Behaviour

Portfolio Management

- General Portfolio Management
- Efficient Frontier
- Post-Modern Portfolio Theory
- Active vs. Passive Management
- Tactical vs. Strategic
- Product Allocation
- Socially Responsible Investing

Retirement Planning

- General Retirement Planning
- RRIF/LIF/PRRIF
- IRA, Distributions
- Investment Liquidity
- Pension Alternatives
- Government Benefits
- Healthcare
- Annuities
- Mortality
- Employee Benefits
- Sustainable Withdrawal Rates
- Stochastic vs. Deterministic Forecasting

Business Practices

- General Business Practices
- Information Technology
- Product Shelf
- Recruitment
- Marketing
- Fee Structure
- Best Practices
- Business Models
- Practice Succession Planning
- Cost of Compliance
- Professional Issues

Holistic Planning

- General Holistic Planning
- Demographics
- Holistic Planning vs. Modular

Behavioural Finance

- General Behavioural Finance
- Client Relationships
- Goal Visioning
- Consumer Attitudes
- Risk Tolerance
- Financial Literacy
- Self-Managed Financial Planning

Compliance

- Litigation & Compliance
- Ethics
- Principal-Agent Problem

Other Planning

- Specialized Financial Planning
- Business Planning
- Education Planning
- Other Accumulation Goals
- Multi-Goal vs. Modular
- Average vs. Graduated Tax
- Divorce Planning
- Terminal Illness
- Non-traditional Families
- Job change/loss
- Dependents with Special Needs
- Islamic Financial Planning
- International Planning
- Econometric Assumptions

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