

# Reminder! Your IEEE Hamilton Section is providing a...

## Financial Planning Seminar

**Date:** May 13, 2003

**Time:** 7:00pm-9:00pm

**Location:** Park Bible Church, 1500 Kerns Rd, Burlington, Ontario.  
(Map and directions attached)

### Featuring...

#### Brian C.M. Hutson, BSc(Hons), CFP, TEP - Financial Advisor

Brian graduated with a Bachelor of Science (Honours) from Queen's University and spent 5 years in the pharmaceutical industry before deciding to switch to the financial advisory business because of his keen interest in the topic. He has accumulated 10 years of experience, spending 8 with a large national mutual fund company before moving to KingsGate Securities Limited, where he deals in stocks, bonds as well as mutual funds. He has added Certified Financial Planner (CFP), Trusts & Estates Practitioner (TEP), and Canadian Securities course (CSC) and to his roster of accreditations. He is also a Level II Insurance Broker.

The following provides an overview of the session. Please note that Brian is quite willing to adapt the topics on the fly in order to suite the interests of audience:

#### **INVESTING 101 – IT AIN'T AS COMPLICATED AS YOU THINK**

- The three categories of investments – bikes, cars & planes
- Let's learn the lessons from the past 5 years
- Hey not everything is down – what actually made money last year.

If time permits:

- The GIC pyramid scheme
- The new types of investments –here to stay or flavour of the day?

#### **Basic Financial Planning**

- What really is and what is NOT a financial plan
- How to structure debt to your benefit, not the bank's

If time permits:

- Buying a car for half the cost
- Cutting through the insurance quagmire what is and isn't relevant

#### **What The Tax People Don't Want You To Know**

- RRSP tax traps & how to avoid them
- How to get Rev Can to pay down your house or your toys

If time permits:

- How to get a triple deduction from your investments

#### **Retirement & Estate Planning**

- How much money will you need – Do you know your number?
- Creative use of trusts for retirement income

If time permits:

- What gets forgotten in almost all retirement plans
- Beware the perils of probate planning
- Retiring in the 21<sup>st</sup> century is different – what you need to know NOW

**Additional...  
Info?  
Directions?  
Questions?**

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