
Which trail...



is right for you?



The Planning Trail

Is your Financial Coach clear on what your vision, values and goals are, before they suggest strategies? Our two programs below help us discover yours...

The Planning Trail Program

This program was created to support my customers' achievement of their goals for financial independence. Our value proposition includes:

- **Goals and Gaps Worksheets** are used to help customers achieve their goals and close their planning gaps.
- **Team Member Tracking System** allows us to identify your current planning team members and their areas of expertise. Rawling Financial also has access to value-added accounting support, as well as strategy expertise from several financial product experts.
- **Vision Capture** records and transcribes your "three year vision." It provides a chance to help you define your most important personal and professional goals. I also capture the greatest potential dangers, opportunities and strengths.
- **A DVD of your vision** (video recording).
- **Your Personal Financial Security Plan** provides net worth, major purchase, education, retirement, life insurance, and estate analysis.
- **Investment Allocation Process** analyses your risk tolerance and tells whether or not your investments are balanced to your investment risk tolerance level.
- **The Risk Comfort Analysis** tells me what levels of risk you are willing to accept in order to resolve existing planning gaps.
- **The Complexity Analysis** illustrates what levels of complexity you are willing to accept in selecting appropriate strategies.
- **Three month follow-up** We will discuss your progress on your "Goals" and "Gaps".
- **Our Fee** is \$1,700. We are offering existing clients a 10% discount off our current renewal fee in the 2nd year onward.

Family Biography Program

We capture your family story from a values based perspective. This could be the "operating manual" that goes with a family financial legacy. Approximate 2 to 2½ hour interview video production in the DVD format \$2,500. Each additional set of DVD disks is \$75.

Rates for programs are effective October 1st, 2009. All Fees are based on a 50% deposit at the start of each year's program, with the balance due when the final report is delivered. Fees are subject to change.

The Product Trail

The Product Trail is where I help our customers find the right tools to fill a clearly identified need that they have. This could include, but is not limited to, establishing products from various suppliers such as:

- Life Insurance
- Disability Insurance
- Critical Illness Insurance
- Investments
- Employee Benefits

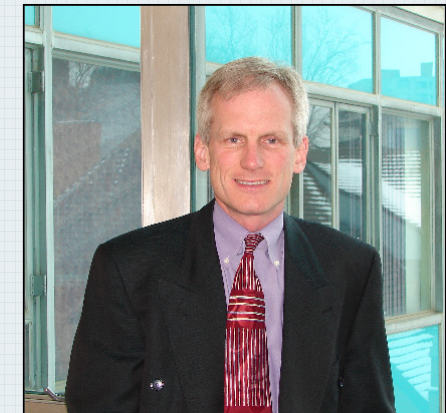
We could end up here after traveling down *the Planning Trail* or you may be a customer with specific needs that must be filled before any in-depth planning is considered.

There are no fees for this service.

Hugh Rawling, CFP, CLU, CH.F.C., Financial Coach and President, Rawling Financial Inc.

In 1979, Hugh joined London Life as a financial security advisor. In July 1998, he established his own business; Rawling Financial Inc.

Hugh holds three major financial planning designations: Certified Financial Planner (CFP), Chartered Life Underwriter (CLU), and Chartered Financial Consultant (CH.F.C.). He is Past President (1990) of the London branch of Canadian Association of Insurance and Financial Advisors (CAIFA), now known as ADVOCIS. Hugh is married to Dorli and has two daughters, Ali and Maddie.



Here's what some of our customers have to say:

“I have really enjoyed the Planning Trail Program, especially when I was able to listen to the CD and read the report. It opened my eyes to the things that have to be done, with the Goals and Gaps, and I am glad that we had the opportunity to go through that. I have a vision for the next 5 to 10 years in terms of the direction that I am going, and it is nice to have those kinds of things down on paper. I think I will use the program more and more over the next few years. I am accomplishing a little bit more than I would have otherwise, and I think I will accomplish a lot more a year or two from now.”

– *Dr. Brad Carson, Sunningdale Dental Centre, London, ON.*

“My wife and I did the Planning Trail Program with Rawling Financial Inc. It was a great process that helped us get clarity of our financial goals. The vision part of the program did a good job identifying the Gaps between what we want to accomplish, personally and professionally, and where we are heading now. It helped to receive the “action items”, so we can feel we are making wise financial choices going forward.”

– *Rick McElroy, President, Universal Marketing Systems Inc., Milton, ON.*

“Hugh Rawling understands the needs of today's business owner. I would encourage anyone who has questions about their financial future and security to meet with Hugh. He will work hard at taking care of your concerns.”

– *Scott Webster, President & CEO, Scholar's Choice-Moyer, London, ON.*

“The team at Rawling Financial provides excellent, committed service. They are approachable, professional and have never tried to get me into a financial package that I don't need.”

– *Dr. Philip Walsh, Managing Director, Energy Objective Ltd., London, ON.*



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FINANCIAL
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