

2022 Wealth Matters Webinars

brought to you by:



RRSP Clinic - Wednesday, January 19 at 10 am (60 min)

The 2021 RRSP contribution deadline is March 1! Now is the time to have your questions answered by the experts. Come hear the answers to common questions and ask your own.

TFSA & RRSP Coordination - Wednesday, January 26 at 10 am (60 min)

TFSA? RRSP? ASDFK?! Let's compare the two plans to decide when and how to use them, and to coordinate them effectively. How can you incorporate Home Buyers and Life Long Learning plans in your financial future?

All webinars start at 10 am MST. To register, email: WealthWebinars@servus.ca

Webinars are complimentary to both Servus Credit Union members and non-members

There are no obligations after attending live sessions or listening to recordings

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JANUARY

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New Year's Day

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RRSP Clinic

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**RRSP & TFSA
Coordination**

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Insurance for Business Owners - Wednesday, February 9 at 10 am (60 min)

Taking care of business (and your family) while you take care of everything else.

Business Succession Planning - Wednesday, February 16 at 10 am (60 min)

You've worked hard to make your business successful. If you are looking to transition out of your business in 5 years or sooner, join us to learn about the details to be completed.

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FEBRUARY

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**Insurance
for Business
Owners**

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**Business
Succession
Planning**

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Family Day

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Investment Fraud Red Flags - Wednesday, Mar 23 at 10 am (90 min)

Being a victim of investment fraud can be devastating. And it's easier than many people think for scam artists to con you out of your hard-earned money. But there's good news: even the most sophisticated, well-orchestrated schemes usually present red flags – you just need to know what to look for. Protect yourself and your money.

Financial Planning Basics - Wednesday, Mar 30 at 10 am (60 min)

Savings, debt, bills... Feeling overwhelmed and don't know where to start? See how we can guide you on your path to financial freedom.

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MARCH

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RRSP Deadline

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International
Women's Day

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Daylight Savings
Time begins

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**Investment
Fraud Red
Flags**

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**Financial
Planning
Basics**

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Responsible Investing - Wednesday, April 20 at 10 am (60 min)

Can you feel good about your money and still grow your wealth? Join us to hear how you can achieve both in your investments.

Registered Disability Savings Plan (RDSP) - Saturday, April 23 at 10 am (60 min)

Do you (or does someone you love) qualify for the Disability Tax Credit? If so, you may be eligible to open a Registered Disability Savings Plan. Join us to learn more, including how government bonds and grants may help you reach your long-term savings goals faster.

Investing in Real Estate & Market Portfolios - Wednesday, April 27 at 10 am (60 min)

Is it better to invest in real estate or market portfolios? This question looms for all investors. There are pros and cons for investing in each sector. Which is best suited for you?

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APRIL

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Good Friday

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Easter Monday

**Responsible
Investing**

Earth Day

**Registered
Disability
Savings Plan
(RDSP)**

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**Investing in
Real Estate &
Market
Portfolios**

Personal Income
Tax Return Due Date

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Federal Budget & Economic Update - Wednesday, May 4 at 10 am (60 min)

Does the economy and federal budgets stress you out? Do you find it confusing and hard to understand? If so, you are not alone. Join us as we help simplify how these factors can affect your financial goals.

The Sandwich Generation - Wednesday, May 11 at 10 am (60 min)

Do you feel pulled in different directions,? Are you finding yourself delaying retirement plans to offer financial support to aging parents and adult children? Join us to discover ways we can help you feel confident about your retirement while being there for your loved ones.

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MAY

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| 1 | 2 | 3 | Federal Budget & Economic Update 4 | 5 | 6 | 7 |
| Mother's Day | | | The Sandwich Generation | | | |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Victoria Day | | | | | | |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |
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Vacation Properties - Wednesday, June 1 at 10 am (60 min)

For parents and children alike, the family cottage or cabin is more than mere bricks and mortar. It's a sentimental place, which is why planning for its succession is as much art as it is science. This session looks at the interpersonal, tax & legal challenges that may be ahead, and offers some options to help protect family wealth and preserve family harmony.

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JUNE

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**Vacation
Properties**

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Father's Day

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Tax-Smart Investing for Business Owners and New Measures for Private Corporations - Wednesday, July 27 at 10 am (60 min)

Learn about managing taxes to boost retirement savings and reduce the risk of outliving savings in retirement. And hear an update on the new tax measures impacting owners of private corporations on limiting the benefits of income sprinkling and of accumulating passive investment income.

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JULY

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Canada Day

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**Tax-Smart
Investing**

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RESPs and Education Savings - Wednesday, August 10 at 10 am (60 min)

Are you finding education costs are increasing at a faster pace than you can save? Join us to learn ways we can help you boost your education savings.

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AUGUST

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Heritage Day

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**RESPs and
Education
Savings**

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Income in Retirement - Wednesday, September 21 at 10 am (60 min)

Learn about ins and outs of CPP, OAS and ways to best align various income sources in retirement, including your own registered savings.

Decoding your pension - Saturday, September 24 at 10 am (60 min)

Do you have a pension with your employer? Have they made it easy to understand your options now and for retirement? If not, then join us as we help you navigate your options now while you are working as well as when you transition to retirement.

Insurance Planning - Wednesday, September 28 at 10 am (60 min)

Protection for Life; your insurance should evolve as you do. Join us for creative strategies to help you plan for the unexpected.

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SEPTEMBER

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Labour Day

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Income in Retirement

Decoding Your Pension

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Insurance Planning

National Day for Truth and Reconciliation

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Corporate Insured Retirement Strategies - Wednesday, October 19 at 10 am (60 min)

Having your cake and eating it too. Tax-friendly ways to unlock your assets in your corporation to help fund your dream retirement.

Executor Bootcamp - Saturday, October 22 at 10 am (120 min)

Dealing with a death of a loved one is hard. Settling their estate on top of it can be overwhelming. Come learn about an executor's duties and get answers from legal and estate planning experts.

Tax Guided Investment Planning - Wednesday, October 26 at 10 am (60 min)

Are you paying more than you should be? Join us as we discuss tax-efficient investment strategies that will help keep more of your hard-earned savings in your pocket... where it belongs!

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OCTOBER

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Thanksgiving

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Corporate Insured

Credit Union Day

Executor Bootcamp

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Retirement Strategies

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Tax Guided Investment Planning

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Halloween

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DIY investing - Wednesday, Nov 2 at 10 am (90 min)

Self-directed investing is popular with new and long-time investors. Learn if this investing approach is right for you and the fundamentals to opening a trading account, researching and trading investments, and avoiding common DIY investing mistakes.

Why Work With An Advisor - Wednesday, Nov 9 at 10 am (60 min)

Do you find the financial world scary and not sure where to start? Wouldn't it be nice to have someone help you navigate your financial goals so that you can focus on living your life to the fullest? Join us to see the advantages of working with an advisor.

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NOVEMBER

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**DIY
Investing**

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Daylight Savings
Time ends

**Why Work
With An
Advisor**

Remembrance Day

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Charitable Giving - Wednesday, Dec 7 at 10 am (60 min)

You support your favourite charitable causes because you care. Sometimes you share their message, sometimes you volunteer, and sometimes you donate. By understanding how donation tax rules work, you can strategically – and legally – exploit the system, thereby reducing your cost to donate, increasing what the charity receives, or both.

Insurance Strategies for Legacy Giving - Wednesday, Dec 14 at 10 am (60 min)

Is leaving a lasting legacy important to you? Join us to explore how you can maximize your impact in a way that is close to your heart.

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DECEMBER

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**Charitable
Giving**

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**Insurance
Strategies
for Legacy
Giving**

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Christmas Day

Boxing Day

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