

What does a financial advisor do?

Why it's a good idea to get a financial advisor and what a financial advisor can do for you

A financial advisor can play an important role at any stage of your investment journey. Here is a list of some of the supports an advisor can provide:

- A wide variety of financial solutions for your investment portfolio based on your unique goals and risk tolerance.
- Education and context to help you understand and gain confidence in your financial plan.
- Guidance and support to instill good savings and investing habits and help you avoid common investing pitfalls.

90% 

Investors surveyed who agree their advisor makes them feel more confident about reaching investment goals and ensures a better return on investment.

90% 

Investors surveyed who agree that their advisor is worth the fees.

Source: Pollara 2024 Mutual Fund and ET Investor Survey

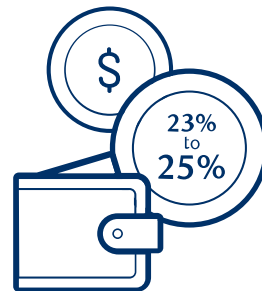


Canadians who work with an advisor have been more successful at building wealth and achieving their goals

Advisors have made a very tangible difference in the lives of Canadians from all backgrounds and levels of wealth. Here are a few examples of what that difference can look like.



Increase in retirement savings
that clients who work with an advisor could see¹



Increase in retirement consumption
that clients who work with an advisor could see²

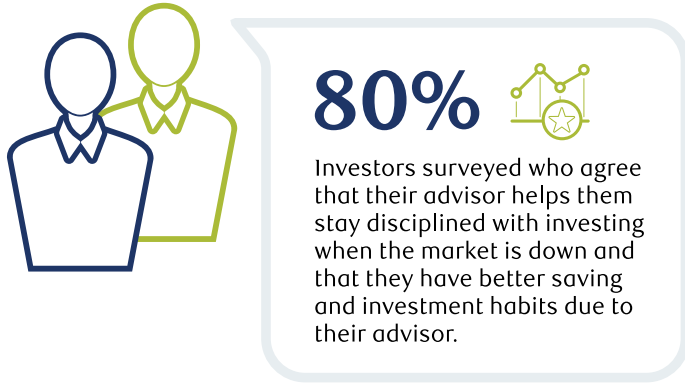
¹ Source: Saving for the Future, IFIC, 2021

² Source: Saving for the Future, IFIC, 2021

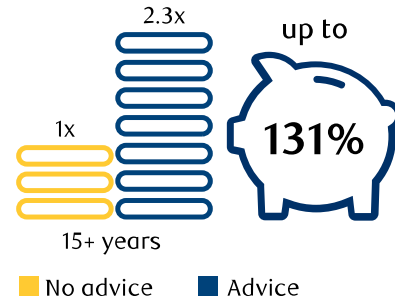
Keeping your goals on track

Investment returns are important, but saving on a regular basis is equally important when it comes to reaching your financial goals. Many investors credit their advisor with helping them build better savings and investment habits.

Advised clients are more successful at saving



Source: Pollara 2024 Mutual Fund and ETF Investor Survey



Increase in savings the average household saw that worked with a financial advisor for 15 years or more compared to a similar household without a financial advisor.

Source: Claude Montmarquette & Alexandre Prud'homme, 2020. "More on the Value of Financial Advisors," CIRANO Project Reports 2020rp-04, CIRANO.

Having a positive sense of well-being

Your advisor will answer your questions and help you understand how investing can help you achieve your goals. Their professional advice can play a vital role in giving you confidence in your plan and a positive sense of well-being with respect to your finances.

94%

Investors surveyed who are satisfied with their advisors.

92%

Investors surveyed who say they trust their advisors.



Source: Pollara 2024 Mutual Fund and ET investor Survey

MORE THAN JUST INVESTMENTS

Today's financial advisor may offer you a lot more than investment recommendations. Those who are registered as financial planners can also provide a range of financial planning services and resources that can help you guide your family through a lifetime of evolving financial needs. These may include:

- Investment management
- Guidance setting financial priorities
- Retirement and estate planning
- Tax planning
- Intergenerational wealth transfer
- Business building and succession

Contact a financial advisor today for more information on how they can help you reach your financial goals.

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