

Scotiabank® Main **Investor Scenarios** Right Track Tool Video Tips

Investor Scenarios

A big life change is often the perfect time to start thinking about long term goals. What's right for you really depends on your unique situation.

Video player interface with controls: Play/Pause, Volume (VOL: - +), Previous (PREV), Next (NEXT).

Needs a sounding board

There are many things to determine when building a portfolio to meet your changing needs. Financial goals, time horizon and your risk tolerance are all important. Also questions like, should you catch up on unused contribution room, is it time to set up a regular contribution to your RSP in order to maximize opportunities need to be answered. An advisor can be your sounding board to make sure you have a solid plan that's right for you.

Related Article
[Find the right amount of investment risk](#)

Choose an 'investor' that best represents your present investment situation:

Hi, I'm Josh. My wife Amy and I just had our first child and with a big life change like that, we really started to look at our investments and retirement needs. Of course, our family and friends have all been very quick to offer their opinions – what to invest in based on how their investments have performed for them. I've done my own research and have some ideas but decided to get expert advice from a Scotia advisor.

Wow. Between our research and the Second Opinion from Scotiabank, we got customized advice based on **our** criteria—not my Dad's, or my best friends - OURS. And they didn't judge the ideas I had. The Scotia advisor answered our questions and helped us come up with a plan that that's right for us.

They really helped us make the most of what we have, for now and our family's future.

Sideline A copy:

A big life change is often the perfect time to start thinking about long term goals. There's lots of information out there, and lots of opinions on what to do with your investments--but what's right for you really depends on your unique situation.

Sideline B copy

Things like investment knowledge, financial goals, time horizon and your risk tolerance are all important factors in building a portfolio designed to meet your needs. Taking action is more than just what to do today, it's about what to do moving forward as your life changes. Should you catch up on unused contribution room? Is it time to set up a regular contribution to your RSP in order to maximize opportunities? An advisor can be your sounding board to make sure you have a plan that's right for you.