

Bruce Sellery

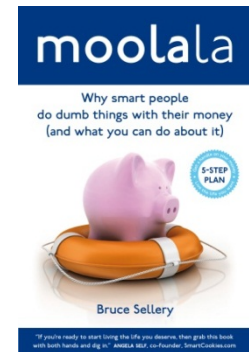
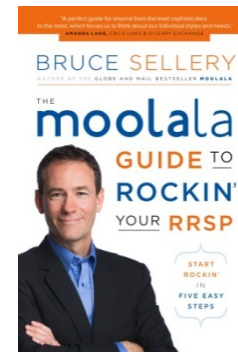


Financial Journalist
Key Note Speaker

Bruce is the founder of Moolala, a personal finance training company.

Previously an anchor at CTV's Business News Network (BNN).

Key Note Presentation



In partnership with
MoneySense

 **iShares**[®]
by BLACKROCK[®]

moolala





IDEA



REALITY





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REALITY



REALITY



"A perfect guide for anyone from the least sophisticated to the most, which forces us to think about our individual styles and needs."
AMANDA LANG, CBC'S LANG & O'LEARY EXCHANGE

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THE

moolala

GUIDE TO

ROCKIN'

YOUR RRSP



START
ROCKIN'
IN
FIVE EASY
STEPS

OBJECTIVES



- 1) Make retirement savings *relevant*
- 2) Have you commit to a *simple plan*
- 3) Leave you *inspired*

Step 1:
Lay the
foundation

Step 2:
Determine
what
you want

Step 3:
Develop plan
to get what
you want

Step 4:
Take action
on the plan

Step 5:
Stay engaged
with the plan

STEP 1:

LAY THE FOUNDATION



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RETIREMENT

is a

LIFE STAGE,

NOT AN ACTIVITY.







Thinking about retirement activities...

1) Makes it **real**

2) Helps you **calculate** costs

What do you want to “do” in retirement?

TRAVEL

FAMILY

EXPERIENCES

HEALTH

HOME

CONTRIBUTION

HOBBIES

WORK

What are 3 things
you want to "do" in
retirement?

STEP 2: DETERMINE WHAT YOU NEED



Step 1:
Lay the
foundation

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How much do you
need to be able to
do what you want
in retirement?

THE RULE OF \$20



$$\begin{aligned} &\text{Target retirement income} \\ &\quad \times 20 \\ &= \\ &\text{Nest egg required} \end{aligned}$$

THE RULE OF \$20



Target retirement income

\$70,000



What do you
need to do
to determine
how much
you need?

STEP 1:

DEVELOP THE PLAN



Step 1:
Lay the
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Develop the plan

- 1) Set a realistic goal
- 2) Determine risk profile
- 3) Determine asset mix
- 4) Choose your ETFs
- 5) Open brokerage acct
- 6) etc.....

What are 3 steps
you need to take
on your plan?

STEP 4:

TAKE ACTION



Step 1:
Lay the
foundation

Step 2:
Determine
what
you want

Step 3:
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to get what
you want

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on the plan

Step 5:
Stay engaged
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IDEA

REALITY



What will it take to take action?

DISCIPLINE

PATIENCE

CREATIVITY

COURAGE



What will it take for
you to take action?

I will need to be _____
when it comes to _____.

STEP 5: STAY ENGAGED WITH THE PLAN



Step 1:
Lay the
foundation

Step 2:
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what
you want

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RETIREMENT
SAVINGS IS A
HABIT.



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