

Wealth may be simple,
but it's not easy.



Markets, investing and financial
planning can be complex

Let Planwright Financial
help simplify your
financial future.

planwright.ca

planwrightfinancial@encompasscu.ca

PlanWright Financial
522-10 St.
Wainwright, AB T9W 1P4
1.877.842.1774

Email us at
planwrightfinancial@encompasscu.ca,

or contact your local branch:

Wainwright	780.842.3391
Chauvin	780.858.3751
Consort	403.577.3949
Edgerton	780.755.4064
Hardisty	780.888.2883
Hughenden	780.856.6070
Irma	780.754.4001

Administration Office

502 10 Street
Wainwright, AB
T9W 1P4
Tel 780.842.3391
Fax 780.842.2855

For your convenience, PlanWright Financial's
specialists will travel to your local
Encompass Credit Union branch or you can
meet with them at our Wainwright location.

PlanWright
FINANCIAL
for your peace of mind

**WE'RE COMMITTED
TO YOUR FUTURE.**

At PlanWright Financial, and
Credential Asset Management
our professional advisors can help you
achieve your financial goals with sound
planning and investment strategies.

Call us today!



Credential[®]
Asset Management

No pressure, No obligation.

Want to see how **easy** it is to get an appointment with us?
Fill out this form, and we'll call you **right away** to set one up.

Take time to plan your future

To create the future you want you need a solid financial plan. At **PlanWright Financial** we know investment planning is more than crunching numbers. We give you expert advice, making complex choices simple.

Retirement Planning

Do you wonder if you will have enough money saved for your retirement? **PlanWright Financial** can help you plan to retire next year or decades from now.

Estate Planning

Estate planning is more than simply dividing assets among your heirs. **PlanWright Financial** knows that making sure your estate is taken care of properly is important to you and your family. We can help you structure your affairs ahead of time.

Life Insurance

We all want the peace of mind in knowing that our loved ones will be taken care of once we are gone. **PlanWright Financial** offers life, disability, critical illness, and long-term-care insurance, so that you and your loved ones are protected.

A Part of Encompass Credit Union Ltd.

Members trust Encompass Credit Union to give them the best possible financial services. **PlanWright Financial**, our wholly-owned subsidiary is backed by that same strength and reliability. We are here to serve the whole community. Come, ask us about life.

Book an appointment @
1-877-842-1774



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Credential Asset
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PlanWright offers insurance and segregated fund products.
• Manulife Financial • Canada Life • Sun Life
• Standard Life • CUMIS • Industrial Alliance Pacific
... and much more.



Name _____

Phone _____ e-mail _____

I'm interested in:

- | | |
|--|--|
| <input type="checkbox"/> Financial Planning* | <input type="checkbox"/> Life or Mortgage Insurance |
| <input type="checkbox"/> Retirement Planning | <input type="checkbox"/> Disability Insurance |
| <input type="checkbox"/> Estate Planning | <input type="checkbox"/> Critical Illness Insurance |
| <input type="checkbox"/> Annuities/RRIFs | <input type="checkbox"/> Group Insurance |
| <input type="checkbox"/> RRSPs | <input type="checkbox"/> Shareholder/partnership Insurance |
| <input type="checkbox"/> RESPs | <input type="checkbox"/> Key Man Insurance |
| <input type="checkbox"/> TFSAs | <input type="checkbox"/> Office Overhead Insurance |
| <input type="checkbox"/> Mutual Funds* | |
| <input type="checkbox"/> Segregated Funds | |

*Mutual funds and related financial planning services are offered through Credential Asset Management Inc.

- I consent:** to having PlanWright Financial contact me at the above phone number or email for the purpose of discussing my financial planning, insurance and investment needs.
- Staff received:** verbal consent from the member to be contacted.
Date: _____ (only when member is not present)
Staff Initial _____
- I authorize:** Encompass Credit Union to provide PlanWright Financial/Credential Asset Management Inc. with the information pertaining to a non-obligation financial plan, life insurance quote, disability quote, or investment options, being prepared by PlanWright Financial / Credential Asset Management Inc.

Note: No financial institution or person acting in the transaction with the approval of a financial institution shall require as a condition of any transaction that a person who receives a product or service under the transaction must transact additional or other business with the financial institution or other person providing the product or service, except in prescribed circumstances.
PlanWright Financial/Credential Asset Management Inc. to provide Encompass Credit Union Ltd. with information pertaining to the financial plan, life insurance quote or other information received through the services of PlanWright Financial/Credential Asset Management Inc.

X _____

X _____
Signature(s)

Referred by _____

Branch _____ Date _____