

Gone FISHING

*With Laurie MacDougall, CFP, CIM, FCSI
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You will frequently see this picture of the two empty deck chairs. Filling these chairs is our vision of what we strive to help clients achieve. They represent your vision of your future. All that is missing from this picture is you!

A lone fisherman sat on a stretch of beach. His single fishing pole was planted in the sand. Along came a businessman on vacation. "Why don't you have two poles so you can catch more fish?" the businessman asked. Then what would I do?" asked the Corsican. "Then you would take the extra money, buy a boat, get nets and a crew, and catch even more fish." "Then what would I do?" asked the fisherman. "Then you could move up to a fleet of large ships, go wholesale, and become very rich." said the businessman. "Then what would I do?" asked the Corsican. "Well, then you could do whatever you want!" shouted the businessman... and the Corsican replied, "I am."

~ Author Unknown

What better way to start a column called "Gone Fishing" than with a fish story! When Alan asked me to write a quarterly column about planning, whether it is financial, retirement, estate or legacy planning, the first thought that came to mind was fishing.

The term "Gone Fishing" for me means, I made it! I can do whatever I aspire to do. I set my goals, I worked and planned my life so that I could "go fishing" knowing that my plan was in place, my retirement was secure, my family would be looked after and I would leave this world knowing that I made a difference. This column isn't about fishing (sorry guys!) it's about life and how to get what you need and want out of it.

Maybe for you it's "Gone Gardening" or "Gone Traveling". Like the Corsican fisherman, if it's your dream – plan for it, work for it and then sit back and reap the rewards of it.

My future columns will be outlining tools and concepts that will help you get there – wherever "there" is for you. The concepts may be simple, some more complex. My goal is to provide you with something to think about and maybe apply to our own life's plan.

Until next time you know where I'll be...fishing of course!

My first investment industry experience was as an assistant at Regal Capital Planners in Waterloo. I graduated into the full-service investment industry in 1986 when I was approached by Merrill Lynch Canada. In 1987 I obtained my licensing as an Advisor.

From Merrill, I moved on to branch administration duties with Midland Doherty, to Branch Administrator for Kitchener and London with Dean Witter Canada. I relocated to London in 1991, where I met and worked with Alan for the first time! After a merger, I moved on to an Associate Advisor role with BMO Nesbitt Burns.

In July 2003, I became one of the founding members of the Wellington West Capital London Branch! We welcomed Alan to our branch in 2005 and I was thrilled to have the opportunity to join his group once again!

In 1997, I was designated a Canadian Investment Manager (CIM) after completing an advanced industry program that focuses on financial planning and investment management. I also obtained the highest designation in the industry, the Fellowship of the Canadian Securities Institute (FCSI). Most recently, I acquired my Personal Financial Planning and Certified Financial Planner (CFP) designations.

I'm truly looking forward to helping all clients build solid solutions to their financial and estate planning concerns!

Laurie

Anatomy of an Investment Career!

