



Vision: After the market crisis of 2008, low risk tolerance became synonymous with prudent investing, so the flight to security drove investors to instruments that protected wealth. Older investors have also embraced prudence in their portfolios but also look to high yield to support their income and lifestyle. This trend has continued and it is investments that deliver on both security and income that have lead the market recovery. This Special Report in The Globe and Mail will examine some of the best investments based on risk, yield and their tax advantages.

Yield

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Booking Deadline: October 6, 2010
Material Deadline: October 13, 2010

Tentative Topics:

- Post Income Trusts: Where are investors focusing now?
- Return on Equity: How do products rank?
- After tax returns: What are the tax

- advantages for different products?
- Life stages: How does life stage impact the appeal of products?

Research:

Globe and Mail readers:

- Are 21% more likely to have sought financial advice over the past 12 months.
- Investable assets are 2X higher than the average Canadian adult.
- Are 20% more likely to have a line of credit.
- Are 22% more likely to have an RRSP
- Are 35% more likely to have a mutual fund.

Source: 2009 NADbank Study

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