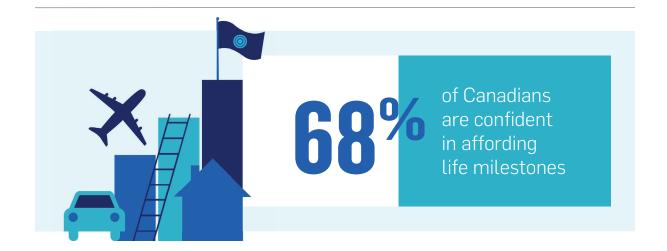




FP Canada™ Money & Milestones Survey



What life milestones are Canadians saving for?

50% Retirement

42% Traveling

19% Homeownership

Other:

- Education
- Starting a business
- A wedding
- Starting a family

How will Canadians pay for milestones?







THE VALUE OF PROFESSIONAL FINANCIAL ADVICE

Canadians working with financial professionals, such as CERTIFIED FINANCIAL PLANNER® professionals or QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professionals, are more confident in reaching their milestones.

I am confident in my ability to afford these milestones



Without a financial professional

Canadians agree working with financial professionals helps them:

Understand how finances work



Simplify financial decisions



Feel more confident about their finances



FP Canada™ Money & Milestones survey is conducted for FP Canada by Leger, the largest Canadian-owned market research and analytics company. The survey was completed between August 15 and August 18, 2025, using Leger's online panel, receiving 1,512 Canadian respondents nationwide. For comparative purposes, though, a probability sample of 1,512 respondents has a margin of error of ±2.5%, 19 times out of 20.