

## 07 Tips for — success



### **Look at what you have achieved so far! Plan for success!**

You may be well on your way to reaching your goal or you may have just started. Treat every small step toward your goal as a win.

Investing and planning your finances can get overwhelming. A great way to help you along the way is to think about where you need support and where to look for it. This worksheet, and the Resources section that follows, will help you do that.

Monarch butterflies go through many changes, from egg to caterpillar to chrysalis and finally to beautiful butterfly. If you follow the right steps you may also see a positive financial evolution.

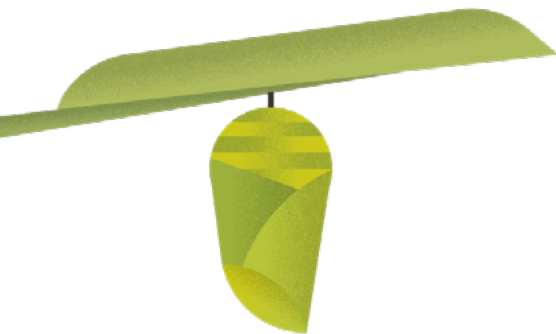
These worksheets were inspired by Indigenous financial wellness expert and artist Simon Brascoupé, co-creator of our Managing Your Money booklet.

[Learn more about the inception of these resources and our commitment to reconciliation.](#)

## Reflect on your investment journey in the spaces below.

1. When I look back at my investment journey, I am most proud of:
2. The areas I am least sure about are (for instance, budgeting, different investment products, frauds and scams):
3. I would like to learn more about:
4. I am going to look for support in the following places:

Check the non-profit organizations around you. Some may offer free financial programs and support.



# Places to look for support

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If you are having trouble with debt or paying bills, you may wish to speak with a credit counsellor. Visit [canada.ca/en/financial-consumer-agency](https://canada.ca/en/financial-consumer-agency). Look for **credit counsellor** in the search bar.

Some **community agencies** have trained financial coaches who can help. They can meet with you one on one and give you information on savings, managing your money, applying for benefits and more. Here are some ways to get help finding a community agency near you:

- Go to the 211 website.
- Call 2-1-1- on your phone.
- Use the Prosper Canada Financial Empowerment Directory at [learninghub.prospercanada.org](https://learninghub.prospercanada.org).
- Check your **local library**. They may hold workshops on money management, savings, and investing.

**Remember that you are not alone in your journey. You can always seek financial guidance and support.**