



THE ESCAPE PLAN

MAKE WORK OPTIONAL

The day work becomes a choice

*A retirement lifestyle and financial clarity program for Canadians
who want the next chapter to begin on their own terms.*

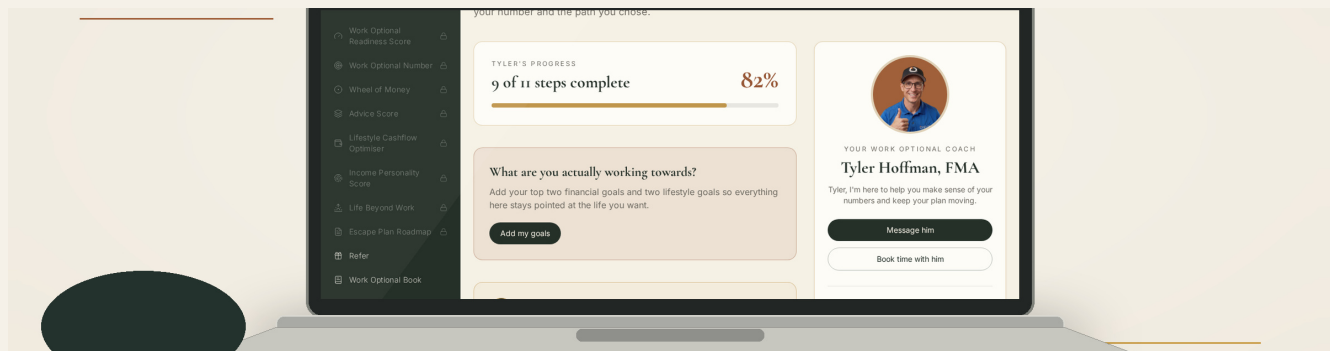
ESCAPEPLAN.CA

THE QUESTION BEHIND THE MONEY

Most advice tells you how much to save. Almost none of it asks what the money is for.

You have done the sensible things. You worked, you saved, you stayed responsible. And still, somewhere in your fifties, a quieter question arrives and refuses to leave: how much longer, and then what?

The Escape Plan begins on the other side of that question. First the life: the mornings, the people, the work you would still choose to do. Then the number that makes it real. Then the path there.



01 Clarity

Name the life you want in your own words, before a single dollar is discussed.

02 Your Number

Translate that life into the Work Optional Number that makes it possible.

03 The Roadmap

A twelve-month path, sequenced, so you always know the next right step.

“For the first time, I stopped wondering if I was on track and started understanding what was actually possible.”



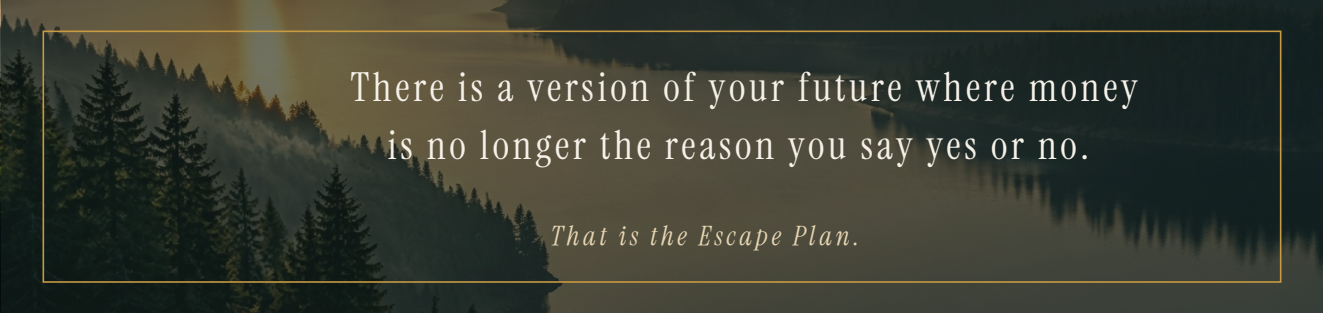
WHAT CHANGES

Work becomes something you choose, not something you owe.

Members describe the same shift. The background hum of financial uncertainty goes quiet. Decisions get smaller and easier: this trip, this contract, this Tuesday. Nothing dramatic happens. You simply stop negotiating with a future you had never actually defined.

You end up with three things you did not have before: an honest picture of where you stand, the one action that matters most right now, and a twelve-month path toward making work optional.

Calm, unhurried, and entirely yours.



There is a version of your future where money
is no longer the reason you say yes or no.

That is the Escape Plan.

A CLEAR PATH FORWARD

Four steps to a retirement built around your life.

Clarity first. Then confidence. Then a plan you can act on.

01

Discover What's Possible

WORK OPTIONAL READINESS

Understand how much freedom your current financial situation creates and identify the fastest path to making work optional.

02

Build Income Confidence

INCOME FREEDOM

Gain clarity around where your retirement income will come from, how it works together, and whether it supports the lifestyle you want.

03

Design Your Ideal Future

LIFESTYLE ALIGNMENT

Define what retirement looks like for you and ensure your financial decisions support the life you are working toward.

04

Create Your Roadmap

STRATEGIC PLANNING

Turn goals into action with a personalised roadmap that shows you exactly what to focus on next.

IN THEIR WORDS

WORK OPTIONAL READINESS

"I was convinced I needed another 10 years before retirement was realistic. What I discovered was that I didn't need more money, I needed more clarity. For the first time, I could see exactly what was possible."

MARK L., ON

INCOME FREEDOM

"I spent years looking at retirement projections and spreadsheets, but I never felt confident. Once everything was organized into a clear income plan, retirement finally felt achievable."

MITCH N., BC

LIFESTYLE ALIGNMENT

"The biggest shift wasn't financial. It was finally getting clear on what I wanted my next chapter to look like. Once I had that clarity, every decision became easier."

JAS S., BC

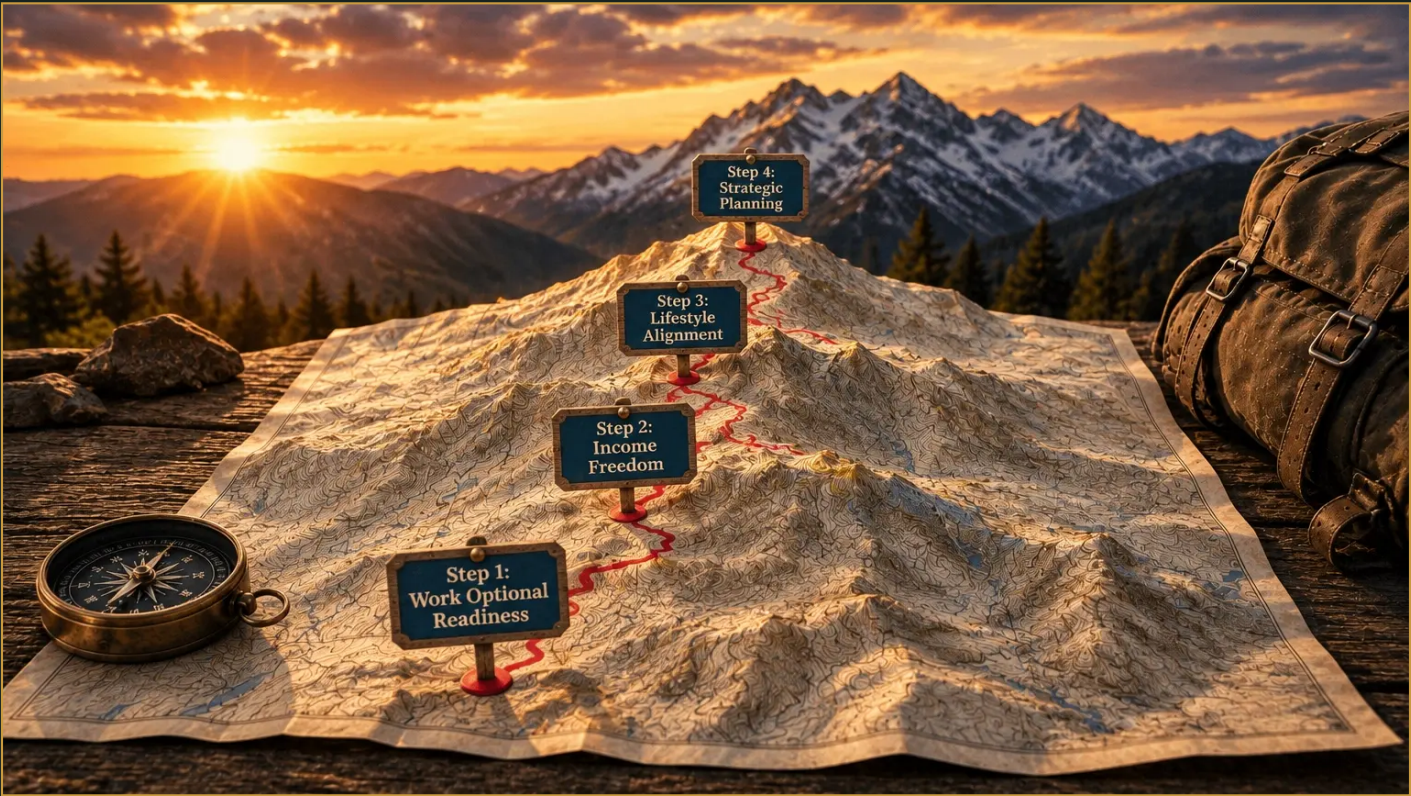
STRATEGIC PLANNING

"What I appreciated most was having a roadmap. Instead of worrying about every possible outcome, I knew exactly what actions would move me closer to the life I wanted."

RAJ J., BC

See the path. Choose your pace.

Each step builds on the last, turning uncertainty into a practical route forward.



READINESS

See where you stand.

INCOME

Know what supports you.

LIFESTYLE

Define what matters.

ROADMAP

Move with confidence.



YOUR NEXT STEP
WORK OPTIONAL READINESS SCORE

How ready are you to make work optional?

In a few thoughtful minutes, see where you stand today—and the areas that could make the greatest difference to what comes next.

GET YOUR FREE SCORE

See what is possible.

www.workoptionalscore.ca

START YOUR ESCAPE PLAN

www.escapeplan.ca

"The biggest surprise wasn't my score. It was realising I had more options than I thought."

TIMOTHY S. / BURNABY, BC

 **OnPoint**
PRIVATE WEALTH COACHING