



to the world you may be one person; but to one person you may be the world.

- Dr. Seuss -

One of our financial professionals can mean the world to you.

Our financial professionals help you define your financial priorities, grow your wealth, manage your cash flow and provide an articulated tax and estate plan to ensure more of your assets remain in the hands of your family.

With our expertise and our professional network, we can take the mystery and anxiety out of planning your financial future.

we care.

- Personal consultation visits
- View your accounts anytime and anywhere
- eDelivery of your statements
- Read our Quarterly Financial Newsletter
- A wealth of information available on our website
- Exclusive educational seminars only for clients
- Worldwide investment choices from major Investment Firms, Insurance companies and Banks
- Personal elderly home care services

advice matters.

As an investor, you pay fees to build and protect your wealth. Your relationship with your financial professional is extremely important. It's worth the investment.



our family is your family.

INVESTMENT PLANNING

FINANCIAL PLANNING

- Personal Financial Planning
- Retirement Planning
- Estate Planning & settlement
- Corporate Financial Planning
- Group Retirement Planning
- Tax planning
- Accounting Services

ESTATE PLANNING

- Notarial Services
- Legal Services
- Wills and Power of Attorney
- Mandate of incapitation
- Real Estate services

- Mutual funds
- Tax Free Savings (TFSA)
- RRSPs
- RRIFs
- Segregated funds
- Guaranteed investments (GIC's)
- Annuities
- Education Savings plan
- Budget planning
- Mortgage loans Services
- Tax Efficient Income Cash Flow

INSURANCE PLANNING

- Life Insurance
- Disability insurance
- Critical illness
- Long term Care
- Travel Insurance
- Health and Dental Insurance

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