



Busy Professional

- You may have a lack of time to devote to managing your investments and are looking for guidance and reminders to ensure your savings are looked after.
- You have assets in a Professional Corporation and/or real estate and you're wondering how this affects your tax situation.
- You have concerns on how you would maintain your lifestyle if you could no longer work.
- Spending time with your family is important to you.
- You are accumulating wealth by working hard so you can enjoy a comfortable and sustainable retirement doing the things you love.
- You have \$1 million plus in investable assets.

Recommendations:

- Create an in-depth wealth plan that includes cash flow projections
- Work with your lawyer and accountant to create an estate strategy
- Update your portfolio to align with your wealth and health protection strategies

Results:

- Increased control and confidence in your cash flow and investment strategy
- Your assets are diversified and you have an allocation that is in line with your risk tolerance and investment objectives
- You are in a better position to plan for retirement on your terms