



Business Owner

- You own a corporation/farm and may have a lack of time to devote to managing your investments.
- You are wanting specialized attention and want to minimize market and business risk.
- You have assets in a holding corporation with retained earnings and you are wondering how this affects your tax situation.
- You have concerns on how you would maintain your lifestyle if you could no longer work.
- You aren't quite sure how you will value and pass on your business or farm to beneficiaries – and have estate planning questions.
- 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 income projections and implement a legacy strategy
- We will work closely with you to develop a strong business succession plan, alongside your lawyer and accountant
- 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