

Your value proposition,
myth and reality
around planning



What people think financial planning is

Retirement

What it really is

Life Goals

Budget, Cash Flow
and Net Worth Statement

Income Splitting and Tax Planning

Investments
and Savings Maximization

Philanthropy

Cross-Border Advice (Can.-U.S.)

Corporate and Trust Planning

Insurance Needs
and Strategic Planning

Revision of Legal
and Succession Documents

Estate Tax
and Balance Sheet Planning



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