

- Diverse portfolios to suit individual investors
- Discretionary investing
- Cash and margin accounts
- Tax-free savings accounts
- Registered retirement savings plans (RRSPs)
- Locked-in retirement savings plans (LIFs)
- Registered retirement income funds (RRIFs)
- Registered disability savings plans (RDSPs)
- Estate strategy and design
- Charitable gifting and sponsorship strategies

- Corporate accounts and strategy
- Succession planning
- Group RRSPs
- Group benefits (health, dental and extended)
- Holding companies
- Key man protection

- Common and preferred shares
- Exchange traded funds (ETFs)
- Mutual funds
- Bonds and debentures
- Segregated funds

- Estate planning
- Financial planning
- Tax strategies
- Insurance policies
- Intergenerational wealth transfer
- Critical illness and disability insurance
- Life insurance (term, whole, universal)

- Educational publications and seminars
- Presentation events
- Family budgeting and finance
- Organizing finances
- Disability tax credit
- Custom design and discretionary for financial wealth
- Mortgage and line of credit referrals
- Assisting your accountants and lawyers

Wealth Management

Investment Options

Our Services To You

Wealth Protection

Business Solutions

Services Beyond Investing

