Assante
WEALTH MANAGEMENT

Be well-advised.

Are you looking at the big picture?

Bring your future into focus through strategic wealth planning

You have ideas on how you want to live your life. And just like any journey, you are more likely to achieve success when you think about where you want to go. Strategic wealth planning can help you to get there by creating a clear road map to guide you along the way.

What is strategic wealth planning?

Strategic wealth planning is not just about investments. Sure, they play an important role in implementing your plan for a successful financial future but strategic wealth planning is about so much more.

It is about you and discovering what matters by engaging in discussions around your needs, priorities, goals and aspirations. Strategic wealth planning can help you define what you want your legacy to be for your family, your business, or your favourite charitable cause.

It can help you to keep more of what you have by minimizing taxes, and anticipating unexpected events that can occur along the way.

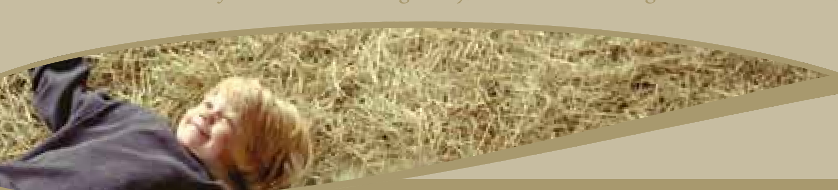
Quite simply, strategic wealth planning is about helping you achieve what is most important to you today, tomorrow and in the years ahead.

Through an integrated, comprehensive approach that encompasses all areas of your financial affairs, strategic wealth planning provides you with coordinated strategies to help you achieve your near and long-term life and financial goals.

It's a fact: those who plan are miles ahead

Planning works. Of Canadians who engage in comprehensive financial planning, 51% are on track to reach their desired lifestyle, compared to 33% who received limited financial advice and 18% who did not receive any.[1] As important as the 51% who are on track are, consider the 49% who are not. Having a plan would empower this group by making them aware of the changes that are needed to meet their goals. Without a plan, how do you know?

[1]*Value of Financial Planning Study, Financial Planning Standards Council, June 2010.*



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Your Assante advisor can help
There are many important questions to consider in creating the road map for your future: What do I have today? Will it be enough to meet my needs? What happens if things change? Will my family be protected?

Your Assante advisor can help you answer these questions and many more that are unique and of the utmost importance to you.

Solutions and support for a wide range of needs
Your Assante advisor can oversee all aspects of your strategic wealth planning. But it's important to know that he or she is not alone in this endeavour.

After gaining a thorough understanding of your needs, your advisor can draw on expert advice from investment analysts, accountants, lawyers and estate planning consultants to deliver a tailor-made plan. And to help ensure that you stay on track to achieve your goals, your advisor works with you and your professionals to implement and adjust your plan to address the evolving needs of you and your family.

Contact your Assante advisor today
You want confidence that you can live the life you envision. We can help.

Whether your needs are fairly straightforward or extremely complex, it's never too early or too late to get started in understanding your complete wealth picture.

Let us help bring your future into focus.

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