

# TODAY'S FOCUS IS TOMORROW'S FUTURE



WELLINGTON  
FINANCIAL



**W**ellington Financial Planning Services has over 17 years of providing financial planning, investment, insurance and estate planning services.

Our financial planners take the necessary time to help identify your financial objectives, prepare a written financial plan tailored to your specific needs, assist with the selection of appropriate financial products and monitor the progress of your financial plan on a regular basis.

We emphasize an interactive approach to financial planning which involves the knowledge and expertise of your professional accountant. The trusted relationship of your independent accountant plays an important part in the financial planning process.

We are committed to assist you in the planning, implementation and monitoring of your long-term financial strategies.

## PILLARS OF SUCCESS

- ⇒ INTEGRATING THE INVESTMENT PROCESS WITH ACCOUNTING, TAX & ESTATE PLANNING
- ⇒ EXPERTISE IN BUSINESS & PERSONAL FINANCIAL PLANNING
- ⇒ RESPONSIVE, PROACTIVE TAX, AUDITING, ACCOUNTING & ADVISORY SERVICES
- ⇒ FLEXIBLE CONSULTATIVE APPROACH
- ⇒ CUSTOMIZED & TAILORED SOLUTIONS
- ⇒ TAX PLANNING & EFFICIENCIES
- ⇒ OPEN COMMUNICATION
- ⇒ DIRECT ACCESS TO YOUR IAIC PORTFOLIO MANAGER

## FINANCIAL SOLUTIONS AVAILABLE

### Advice and Solutions

- ⇒ Personalized Financial Planning
- ⇒ Investment Management
- ⇒ Education Planning
- ⇒ Retirement and Estate Planning
- ⇒ Tax Planning
- ⇒ Insurance Planning
- ⇒ Mortgage and Debt Planning
- ⇒ Severance Planning

### Investment Products

- ⇒ Discretionary Investment Management

### Insurance Products

- ⇒ Segregated Funds
- ⇒ Annuities – Life & Term
- ⇒ Life and Disability Insurance
- ⇒ Critical Illness Insurance
- ⇒ Long Term Care

### Government Registered Plans

- ⇒ Registered Retirement Savings Plans
- ⇒ Registered Retirement Income Funds
- ⇒ Locked-In Retirement Accounts
- ⇒ Life Income Funds
- ⇒ Defined Contribution Pension Plans
- ⇒ Registered Education Savings Plan
- ⇒ Individual Pension Plans
- ⇒ Tax Free Savings Accounts
- ⇒ Registered Disability Savings Plans

### Business Solutions

- ⇒ Group Retirement Savings Plans
- ⇒ Company Pension Plans
- ⇒ Group Life & Disability Insurance

## THE BENEFITS OF FINANCIAL PLANNING ADVICE

Financial planning is the process of assessing your current financial situation, establishing your financial goals and objectives and implementing effective strategies to assist you through your journey to financial success.

Financial planning involves several complex disciplines and takes into account the interrelationships among relevant financial matters including financial management, insurance and risk management, investment planning, retirement planning, estate planning, tax planning, legal aspects and cash flow planning. Both personal and external financial factors can change rapidly. The assistance of an independent financial advisor will carefully tailor your financial plan and be available as an important resource person.

The involvement of a professional financial advisor will increase the likelihood that a financial plan will be followed. The implementing, monitoring and adjusting of any plan are critical success factors.

Our philosophy at Wellington Financial Planning Services Inc. is simple. We wish to establish a personalized and long-term relationship with our clients, utilize the best financial planning practices and procedures and be a trusted partner in the attainment of our clients' personal financial goals and objectives. Together with your accountant, your lawyer and your investment manager, Wellington Financial will help you create a plan tailored to your individual objectives.

Creating wealth goes beyond investment returns. Ensuring your professional team is in sync with tax planning, business planning retirement planning and debt management is our priority, so that you can focus on your business and your life.

### To learn more about Wellington Financial:

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