T·E·WEALTH

SUCCESSFUL WEALTH STRATEGIES SINCE 1972

FAMILY OFFICE SERVICES

INTEGRATE

Integrating
the components
of your legacy
requires
partnering
with the
right name.

ORCHESTRATING YOUR LEGACY DEMANDS TAKING A 360° VIEW

Individuals and families with significant accumulated wealth need an integrated strategy in place to safeguard investments, put together wealth transfer strategies and proactively plan for growth. When coordination of assets such as businesses, homes, real estate investments, philanthropic funds and other investments becomes onerous, comprehensive management service from a Family Office can prove invaluable.

For over 40 years, well-established Canadian families have relied on T.E. Wealth to manage their assets using deep expertise, coupled with a 360° view toward wealth, well being and peace of mind. From preserving legacies and educating younger generations on how to manage them, to advice on tax planning and the best medical care, we bring compassionate and objective counsel to the table always, in all ways.

360° PLANNING

Our total wealth management solutions consider every aspect of your financial portfolio to help you properly plan into the future. We consider how the many facets of your life fit together: your assets, your goals, your family's needs, even your health. It is our view that wealth management extends way beyond one's financial assets; responsible management necessitates considering them all.

CLARITY & VISION

Building wealth often necessitates engaging a roster of professionals for their different areas of expertise. Is there a master plan in place to guide the tax, legal, insurance and investment individuals providing you counsel?

T.E. Wealth works with teams of experts to deliver a singular, unifying vision. We begin with an objective overview of your entire financial picture; with your wishes and priorities identified, we then develop a master plan to ensure that all parties working for you are on the same page: yours.

CONFIDENTIAL COUNSEL

An objective third party such as T.E. Wealth facilitates open communication, voicing concerns, and approaching topics that many families find difficult to speak about. Our experts provide unbiased feedback in order to determine an appropriate course of action, confidentially and compassionately.

INTERGENERATIONAL SUPPORT

Often, families or younger generations require counsel on how to manage a legacy. We serve as Financial Advisory Connection between family members, and as a Coach for younger generations. Our Inheritance and Estate Services assist them with money management, capital preservation and the tax implications of managing a significant estate.

TRANSPARENT, OBJECTIVE COUNSEL. ALWAYS, IN ALL WAYS.

Your Portfolio Manager is supported by a team of multi-disciplinary experts, each with their own area of expertise. Together, this team provides you with a 360° plan tailored to your family's unique needs. Our proprietary, transparent approach means that all fees are fully disclosed, ensuring that your best interests always come first.

RE-ALLOCATE YOUR TIME

Engage professional counsel, and spend your time enjoying what really matters today versus managing the intricacies of your estate.

EVALUATE YOUR LEGACY PLAN

Let our wealth experts evaluate that all your assets, goals and current desires align as they should.

ELEVATE YOUR PEACE OF MIND

Enjoy the security of a trusted wealth management expert, backed by a strong advisory team.

OUR SERVICES INCLUDE, BUT ARE NOT LIMITED TO:

Investment Management & Consolidated Reporting

- Global Investment Strategy
- Asset Manager Selection and Oversight
- Fully Customized Investment Policy
- Performance Management & Benchmark Reporting
- Consolidated Reporting
- Research & Analysis

Intergenerational Counsel

- Financial Advisory & Educator for Younger Generation
- Inheritance Planning

Advanced Financial & Tax Planning

- Tax Planning & Preparation
- Estate Settlement Services
- Charitable Gifting & Philanthropy
- Risk Management & Insurance Review
- Stock Option Exercise Programs
- Retirement Planning
- Sale of Business

Lifestyle Concierge

- Access to Event Planning
- Access to Travel Arrangements
- Access to Personal Services

Medical Concierge

- Access to Best Doctors
- Access to Private Clinics
- Access to Expert Second Opinions
- Access to Health & Elder Care Council

Administrative Support

- Bill Payment & Banking
- Bookkeeping & Accounting Services
- Secure Online Record Keeping & Document Storage

A legacy is
the opportunity
to speak volumes
without saying
a word.

THE T.E. WEALTH EXPERTS

With an average tenure of 15 years in their respective disciplines, our experts have vast experience in all aspects of financial planning, economic cycles and market corrections, making them well equipped to help you navigate fluctuations and nuances in ever-changing global markets.

A 360° DEGREE PLAN CUSTOMIZED TO YOUR NEEDS

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Your life. Your legacy.

To learn more about Family Office Services, please contact:

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