DIFFERENTIATE

T·E·WEALTH

Your life. Your legacy.

Differentiating
your firm
by excellence
requires
partnering
with the
right name.

WE APPROACH YOUR BUSINESS WITH A 360° VIEW.

Your business' success rests in its ability to maintain – and continuously improve – its reputation for excellence. To do this means managing your fiduciary responsibilities, while attracting and retaining the talent you seek most.

Managing fiduciary responsibility goes beyond simply taking proactive measures to ensure your firm is on side with its governance; it's about making sure that your executives are too. Providing senior management with expert financial guidance allows them to focus on the task at hand while increasing appreciation for the value of their benefits. This creates greater loyalty and retention, making your firm more desirable to prospective talent.

Your firm's reputation could be shattered in an instant with one financial misstep. Rebuilding that reputation can be costly and time consuming, taking up valuable resources that would be better invested in the company.

The stakes just hit another level. Are you ready?

Alignment

Well-managed companies tend to outperform their competitors. That's why we employ a top-to-bottom approach that addresses the business, the senior executives and the company employees, keeping all in alignment with corporate strategy.

Distinction

A 360° view of your executives' life goals is our primary point of distinction. This allows us to devise proactive risk management solutions that evolve through various life milestones such as marriage, property purchase and retirement. We will work with executives' accountants, lawyers and other professionals to ensure their best interests are always the priority.

Our financial concierge services include a customized selection of:

- Financial Planning
- Tax Management and Preparation
- Insurance Review and Planning
- Retirement Planning
- Charitable Gift and Legacy Planning
- Survivor Counselling
- Company Incentive Plan Guidance: how to maximize value
- Career Transition Financial Analysis and Planning
- Financial Planning and Management through Health Crisis
- Estate and Family Succession Planning
- Financial Analysis and Planning through Separation and Divorce
- International Advisory Services

Authority

T.E. Wealth understands financial counsel in Canada because we helped create it over 45 years ago. With an average tenure of almost 15 years in their respective disciplines, our experts have vast experience in all aspects of financial planning.

Holding combined accreditations including Certified Financial Planner, Register Financial Planner, Certified Investment Manager, Trust and Estate Practitioner, Certified Professional Consultant on Aging, and Chartered Financial Analyst, our experts guarantee that your fiduciary responsibilities will withstand the highest scrutiny.

Integrity

Our certified financial planners and investment counsellors provide the most comprehensive advice, ensuring that your executives' best interests always come first.

Ready to take your business to the next level? Talk to us.

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To learn more about T.E. Wealth, please contact us: www.tewealth.com · 1-888-505-8608

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