

Who are we?

We are licensed Financial Service Providers with over 40 years experience in the financial services industry with professional Financial Planners (CFP™) and qualified Insurance Brokers.

What do we do?

We seek to understand the things in life that are important to our clients, and then we translate those opportunities, goals and concerns into a financial plan that meets their needs and their risks.

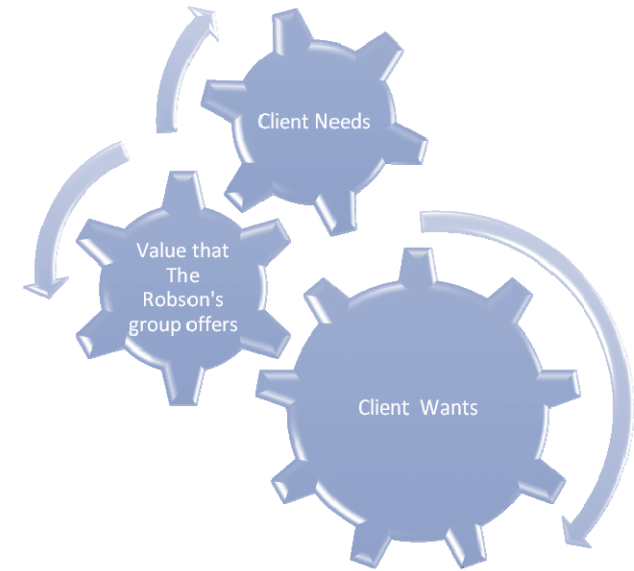
How do we do it?

Once we have gained a full understanding of our clients and we have consulted our team of experts, we identify potential solutions to help build an ongoing plan. We have access to a full range of financial solutions that help you reach your short- and long-term goals.

Why should you deal with us?

We work with you as your partners in understanding your life and financial needs.

- ◆ **Independent:** We are not tied to a single product provider. This means that you have the widest possible options while making well-informed decisions.
- ◆ **Holistic:** We provide advice based on a complete and comprehensive financial & risk analysis with the big picture in mind. This means that all your needs are considered, while taking existing provisions into account.
- ◆ **Relevant:** Our advice is specific to your individual needs and reviewed at least annually. This means that it remains relevant to your needs over time.
- ◆ **Confidential:** Your privacy and security in financial matters are priorities to us. This means that we will not disclose your information to anyone.
- ◆ **Direct, uncomplicated, accurate:** We focus on empowering you to make an informed decision. This means that we will take the necessary time to clarify your unique financial position and to present a financial solution that fits your specific needs.



Clients Wants

- Security*
- Peace of Mind*
- Achieving Goals*
- No Surprises*
- Lifestyle*
- Understanding*
- Advice & Help*

Clients Needs

- Long & Short term Insurance*
- Retirement Planning*
- Estate Planning*
- Investment planning*
- Health planning*
- Banking products*
- Pension funds*