PRIVATE WEALTH MANAGEMENT

The IG Private Wealth Planning Experience

Why?

Our Promise | **Simplicity:** Turning complex finances into well-laid plans

The complexity of your finances can be compounded by not knowing what questions to ask.

We know what questions to ask, across a wide range of expertise, and tailor your experience to your unique goals and aspirations.

Managing cash flow efficiently	Preparing for the unexpected	Planning your major expenditures	Maximizing your business success	Optimizing your retirement	Sharing your wealth
• Cash flow analysis • Secured lending • Residential lending • Tax-efficient income planning	• Income and wealth protection (insurance) • Estate liquidity needs • Estate and trust advisory (Wills and POA) • Living benefits (disability, critical illness, long-term care)	• Credit and liquidity solutions • Education planning • Investment property structuring • Recreational property planning	• Personal and corporate tax integration • Optimizing corporate investments • Pre-liquidity planning • Business succession	• Customized investment programs • Portfolio construction and oversight • Total return strategies • Guaranteed income solutions • Dynamic withdrawal strategies	• Intergenerational wealth planning and transfer • Planning for persons with a disability • Blended family considerations • Charitable giving • Donor advised funds

TAX-EFFICIENT STRATEGIES

Maximize tax-saving opportunities — Tax-efficient investing and asset allocation — Increase net worth through optimized tax planning

> Faisal has implemented a range of different financial strategies from incorporating my medical practice early on, to setting up a family trust and private foundation, to implementing an Individual Pension Plan and now, my will and estate planning. **Through it all, he's made each and every concept simple and understandable.** The result? Peace of mind that goes beyond numbers—to deliver on what's most important to me.
>
> - Dr. Nasim A.

Expertise. Teamwork. Trust.

The **IG Private Wealth Planning Experience** is a deeply collaborative, streamlined process that will bring together an integrated team of financial professionals best suited to your needs.

The depth and expertise of our team will adapt to the complexity of your needs and will always be coordinated by your IG Consultant.

As a client, you can expect:

- Individualized plans that consider all areas of financial planning and multigenerational goals.
- Access to a network of highly specialized regional and head office advanced financial planning specialists.
- A disciplined, yet flexible approach that proactively adapts to your needs and today's ever-changing world.
- Clarity and confidence for even the most complex financial planning decisions.

We are also committed to working with clients' existing personal advisors and other professional partners, to evaluate every opportunity to help grow and preserve your wealth.

PRIVATE WEALTH MANAGEMENT
KHORSHID & ASSOCIATES

You
Unique goals, concerns, and multigenerational family considerations.

Regional Financial Specialists
Wealth planning and portfolio strategists, insurance and estate specialists.

Advanced Financial Planning
Tax accountants, estate lawyers and notaries, financial planning and pension specialists, strategic charitable giving.

Your Personal Advisors
Accountants and Lawyers.

Areas of expertise

Executive compensation | U.S. cross-border issues | Business succession | Family law questions
Philanthropic planning | Corporate and personal taxation | Legacy planning | Retirement income planning

Contact us for more information.

PRIVATE WEALTH MANAGEMENT
KHORSHID & ASSOCIATES

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