



## ATTENTION clients, family & friends

Partnered With



Statistics reveal that less than 50% of all adults in Canada have a Will and that many of these are incomplete, out of date, or inefficient from a tax planning perspective. A growing number of my clients are finding themselves faced with one or all of these types of scenarios.

If it's not an issue of having a Will, it may be the issue of being asked to act as executor on an estate. While this is indeed an honour, the issues you must resolve may be very complex, and failure to perform your role properly can put you at financial risk.

**Effective immediately we are offering the additional services of a Will Analysis & Estate Planning expert. The Roche Financial Group has entered into a strategic partnership with *Compass Group*. I'll now be able to provide my clients professional assistance relating to Will Analysis & Planning and Executor Assistance.**

This means we can offer you more than just tax advice, we can provide insights, expertise and recommendations pertaining to your whole financial plan.

### **Additional Wealth Management Services we'll now be offering:**

- Wills Analysis & Planning
- Trusts & Trustee Services
- Executor & Executor Assistance Services
- Probate Services

## Call Me!

Book an appointment with me to discuss your specific needs