Income for Life

Pay off your mortgage, enjoy income for life, guaranteed.

Wouldn't it be nice if you had the money to pay off your mortgage, pay less tax and do more of the things you want to do without fear of running out of money because of market fluctuations?

Through our partnering with HomEquity Bank and companies such as Sun Life we have designed an "Income for Life" product that is desperately needed by the marketplace. Designed exclusively for homeowners age 55 and older, this product uses a reverse mortgage secured by the equity in your home combined with a Guaranteed stream of "Income for Life" plan from an Insurance Company. Maintain ownership and control of your home, keep the remaining equity in your home, never make a mortgage payment again and enjoy a guaranteed increased income for as long as you live. We are really excited about our new product.

It's part of my added service to you at no additional cost.

Partnered With Roche FINANCIAL GROUP

Partnered With Roche FINANCIAL GROUP

ATTENTION clients, family & friends

Statistics reveal that less than 50% of all adults in Canada have a Will and that many of these are incomplete, out of date, or inefficient from a tax planning perspective.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

(RFG_Compass_MS_12/11)