Our clients include:

• Professionals, lawyers, accountants, senior executives and private bankers who require assistance with their personal investments as well as a trusted partner to help coordinate their financial plan
• Incorporated professionals such as doctors, dentists, veterinarians and pharmacists who may need a greater range of wealth management options and can benefit from enhanced retirement benefits only available to them
• Owner/managers who need help managing their personal and business assets, preparing for their upcoming business succession, converting business assets into personal assets tax efficiently and potentially equalizing their estate
• Pre-retirees who want to make the most of their savings and retirees requiring innovative strategies to maximize their after-tax retirement income, while protecting their financial security
• Established families seeking professional guidance transferring wealth to the next generation in a tax-efficient manner
• Charitable foundations and non-profit organizations requiring investment management according to specific guidelines