CONFIDENCE IS POWER

Structured Transitions for Business and Wealth

Financial Confidence™ provides personal financial advisory and corporate financial advisory services for business families, business owners and executives of privately held Canadian companies.

FCA
FINANCIAL CONFIDENCE ADVISORS

Helping You Achieve Financial Confidence™

About Financial Confidence™

We have over a century of combined experience and are well-qualified to help you achieve your financial and business goals. Our team includes extensive financial planning, accounting, business planning and insurance credentials (including certified financial planner, chartered accountant, chartered life underwriter, certified exit planner and chartered financial consultant) with national recognition.

The Financial Confidence™ team can facilitate the planning and execution of financial and business solutions with other professional Advisors too. When a special expert is needed we will engage the services with our Virtual Project Team, made up of highly seasoned experts in their fields.

Why Choose Financial Confidence™

We've earned the trust of more than 1,000 high net worth business families, business owners, executives and their Advisors since 1999 with our Financial Confidence™ Program. This program can assist you in preserving your hard-earned assets and mitigate losses, while enhancing your portfolio.

Our approach is to prepare a comprehensive financial plan for each of our clients. This includes an analysis of your current situation to provide you a clear understanding of what your retirement income stream will be and identify any shortfalls that may arise. Financial planning is an ongoing process and after completion of the plan, it will require implementation, ongoing monitoring and regular reviews.

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Financial Confidence™ Solutions

We provide a wide range of financial and corporate solutions selected to meet your needs. We will consult with you to consider these services and products to facilitate your plan to meet your goals:

Personal Financial Advisory

- Tax & Estate Planning Solutions
- Trust and Will Planning
- Private Wealth Management
- Retirement Planning
  - Registered Retirement Savings Plans (RRSPs)
  - Tax-Free Savings Accounts (TFSA)
  - Annuities, Registered Retirement Income Funds (RRIFs) and Lifetime Income funds (LIFs)
- Survivor Income Planning
- Asset and Lifestyle Protection
- Long Term Care and Critical Illness
- Planned Charitable Giving
- Living Benefits Solutions
- Creditor Protection
- Advisor Management
- Mortgages

Corporate Financial Advisory

- Family Business Planning
  - Governance
  - Family Wealth Constitution
  - Financial Literacy
  - Succession Planning
- Corporate Structure & Ownership Planning
- Health & Welfare Trusts
- Creditor Protection
- Retirement Compensation Arrangements
- Life Insurance Valuations
- Individual Pension Plans
- Employee Benefits
  - Health & Dental
  - Group RSP/Pension Plan
- Business Exit Planning
  - Business Continuity
    - Key Person Incentive Plans
  - Maximizing & Protecting Business Value
  - Mergers & Acquisitions
    - Sale or Purchase of a Business

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To Achieve Your Unique Financial Planning Goals

Our mission is to help our clients enjoy the freedom that our unique Financial Confidence™ process provides. We believe in fostering solid, long–term relationships with the people that come to us, as trust is an integral part of our business.

FINANCIAL CONFIDENCE ADVISORS INC.

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