DM
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CFP®

OLYMPIAN
Wealth Management & Investment
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David provides all the advice as part of a service package and is not through Olympian Financial Inc.

- Independent Financial Advisor – Access to the Top Wealth management companies in Canada – No Proprietary Products
- Full range of options to invest for non-registered money, RRSP'S, TFSA'S, LIRA'S, RRIF'S LIF'S ETC.
- Insurance Investment Products and Segregated Funds
- **Lifetime Tax Planning for:
  - Current year
  - Next several years
  - Retirement
  - Income splitting
  - Planning for taxes on estate
  - Planning for who gets your estate
- **Review of and recommendations of your:
  - Wills
  - Power of Attorney for Property
  - Power of Attorney for Personal Care, Otherwise known as a health directive
- Income planning for retirement – How to draw the best income and from which sources
- Insurance planning and reviews of: life, disability, long term care, critical illness, home and auto.
- Financial Planning for second/third marriages
- Financial Planning for common law relationships and same sex marriages
- David helps manage client behaviors and expectations to ensure that financial plans are followed
- Children's and Grandchildren's education
- Elder Care – types of living arrangements in the last years of life
- Managing taxes with multiple investments and or properties
- Business and corporate advice on insurance and investment of capital and taxes
- Advice and planning on trusts – family, alter ego, joint partner, Henson, testamentary
- Charitable gifting – for those who wish to discuss and have recommendations provided on how and when to provide the gifts based on your desire to disperse your assets.

***NOTE: Some or all of these services are available to ALL clients depending on each need.**
***NOTE: Each client is given individual advice based on the needs and discussions with each client**

All the above is at no extra cost! This is part of the service and advice that David believes each client is entitled to receive from an advisor.

****David is not an accountant and does not do tax returns. He provides advice only on tax issues to be discussed with your accountant.**
*****David is not a lawyer. He is well versed on Estate Law and provides recommendations for you to discuss with your lawyer. David does not prepare or write Wills and POA's.**