

LIFE INSURANCE SPECIALISTS

- Working with families of wealth for more than thirty years, our expertise and understanding of specialized life insurance strategies will help individuals and corporate owners plan for the future transfer of corporate assets to heirs in a tax-efficient manner. Advanced insurance strategies will protect your assets from eroding on transfer to your heirs because liquidity is the key to protecting wealth.
- Life insurance is a tax efficient pre-funding method to meet a known future tax liability at the exact time funds are required. It is a source of tax-free liquid capital that can be used to finance shareholder buy outs, pay estate-related taxes, meet debt obligations, and enhance inter-generational wealth transfer.
- We are a totally independent insurance broker dealing with all the major Canadian life insurers to provide the most beneficial and cost-effective insurance strategy for individuals and families of wealth.