

*We are client-centered.*

At BW, we listen to you, and will diligently search the market to find the best solution for either your group or business financial needs.

*We are transparent.*

We pride ourselves in not having any conflicts of interest in our process of selecting or recommending investment products for our clients. While some financial advisors are paid to push a

product or generate transactions, at BW we believe in advocating on behalf of the client.

*We are objective & independent.*

BW is an independent and objective

brokerage We adhere to an open-ended approach that is fully customizable and involves shopping around, interacting with different vendors, and creating a financial plan that works for your

business.

**We offer a free, no-obligation consultation to review your current benefits, insurance & investment and legacy needs in whatever way is the most convenient for you.**



## Contact Us



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**We are a client-centered brokerage that shops around for you. Let us make you a priority.**



**BURNETT WEALTH**  
STRATEGIC FINANCIAL SOLUTIONS







## Insurance & Investment Planning

- Individual life insurance
- Health, disability & critical illness insurance
- Investments: registered & non-registered
- Segregated funds
- Mortgages
- Annuities
- Travel insurance



## Personal & Legacy Planning

- Estate planning
- Final arrangements & funeral planning
- Documenting wishes and memories
- Inheritance planning
- Retirement planning and individual pension plans

**Life insurance** can help your loved ones deal with the financial impact of your death. The benefit paid from a life insurance policy is tax-free and can be used to: replace your income so your family can maintain their standard of living, provide for your children & protect the livelihood of a small business.

**Health insurance** provides peace of mind in the event you need medical treatment. A financial plan can be easy to set up and designed to suit all your needs. Plan types can range from investments to life and health benefits, to full plans that include disability and dental coverage.



**Estate and funeral planning** are critically important upon a person's passing, providing comfort and peace of mind to you and your family. A Living Will specifies your wishes for medical care in the event you become incapable of making decisions for yourself. A statement of your wishes can make life a lot easier for those who have to take care of things upon your passing.

## Employee (Group) Benefits

- Life insurance
- Disability insurance (short & long term)
- Health & dental plans
- Group pensions & RRSPs
- Group health & mental health plans



*By implementing a benefits package for your employees, you will not only create a healthier work environment, you will attract and retain highly skilled employees.*

