

Your Local Wealth & Estate Planning Specialist

Serge Assayag is a Wealth & Estate Planning Specialist with Canaccord Genuity Wealth Management (CGWM), a leading independent wealth management firm in Canada.

Serge partners closely with CGWM Investment Advisors to provide comprehensive financial planning, wealth protection, tax mitigation, legacy and estate planning for individuals, professionals and business owners. Serge is dedicated to providing effective and customized solutions for each clients' unique goals.

Serge has 25 years of experience in the wealth management industry and is an Associate of the Society of Actuaries (ASA).

The value of a financial plan

According to the Financial Planning Standards Council (FPSC), 81% of Canadians with comprehensive financial plans feel on track with their financial affairs, versus 73% with limited planning and 44% with no planning.

In addition to giving you peace of mind, a comprehensive financial plan allows you to:

- **Clarify your goals** – You may have some sense of what you want to achieve for yourself and your family, but a comprehensive plan can help to make your financial objectives actionable and measurable, allowing you to track your progress in a meaningful way.
- **Gain a comprehensive view** – A cohesive plan gives you a consolidated view of your financial life, allowing for greater control and more efficiency.
- **Identify opportunities** – With the full view of your financial picture, your advisor can work with you to mitigate tax and find efficiencies within your plan.
- **Follow detailed steps toward your goals** – A financial plan provides you with a detailed road map, with logical steps to follow, to bring your objectives within reach. Along the way, your Investment Advisor will work with you and your network of professionals to implement your plan of action.

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Our planning process

Here is what you can expect when you work with your Investment Advisor and a Canaccord Genuity Wealth & Estate Planning Specialist to develop your plan:

1. Discovery Meeting

At our initial meeting, we undertake a detailed discovery process to gather all the necessary information about you, your family, and your financial goals, concerns and questions.

2. Presentation

Using the information from our in-depth discovery meeting, we put together your initial financial plan. In this meeting, we present the plan to you, evaluate different scenarios and determine which path works best for you. Sometimes this step can take a few meetings as we work together to analyze different financial scenarios to determine the best course of action for you.

3. Implementation

Once your plan is in place, we work with your Investment Advisor to ensure all of the appropriate steps are taken to adhere to the roadmap we have created for you. This includes working with our strategic partners on your behalf to ensure all aspects of your financial affairs are taken care of.

4. Monitoring

Financial planning is not a one-time event; it requires diligent monitoring and updating as your circumstances in life evolve. When we create your financial plan, you also benefit from our sophisticated process of ongoing monitoring and guidance during life events.

If you and your family could benefit from a comprehensive financial plan to bring your goals within reach, contact your Canaccord Genuity Wealth Management Investment Advisor today.

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