

## LOOKING BEYOND THE OBVIOUS IN YOUR INVESTMENTS

After graduating from UVic with a Bachelor's Degree in Economics, Ian embarked on his career in financial services. By meeting the individual needs of people from all walks of life, he has built a solid financial planning practice one client at a time. The growth of his business has been built on referrals from clients who have benefited from Ian's personal approach and years of knowledge and experience.

### A More Personal Approach

In today's world, being an entrepreneur and running a business is extremely rewarding; however, Ian understands that it can be more than a full-time job. As a business owner, Ian understands the challenges of running a business — growing your revenues, being more efficient and profitable in order to provide your customers with the best services and products. Ian's expertise and knowledge as a Certified Financial Planner is present every step of the way. He focuses on every detail and takes the time to really listen to his clients while developing business strategies that are tailored to his clients' needs.

**“We have been clients of Ian's for quite some time. We really appreciate his professional, warm, and friendly approach coupled with his sound knowledge of the financial world. His advice has been timely and valuable. He is readily accessible and shows a genuine concern for our financial well-being.”**

**Dave and Diane Allan**

### The Experience to Make a Difference

With 18 years of advising small business owners, Ian brings the expertise and knowledge to develop a business strategy designed for each individual. Many business owners rely on their company to provide family income, personal financial security, and a legacy for the next generation. Ian considers the events that could jeopardize the viability of the business and offers strategies to protect against these eventualities. Ian partners with you to tackle tough decisions with smart solutions. Whether you require a carefully constructed business continuation



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Economics, Certified Financial Planner,  
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plan, such as a buy-sell agreement or tax and insurance solutions for the orderly succession of your business, Ian has proven experience in helping business owners to achieve their financial goals.

### Reasons to Consider Ian as your Business Financial Planner:

- You would like someone to provide you with wealth building strategies that go beyond just investment and tax solutions.
- You want peace of mind that your business and family will be secure by putting risk management solutions in place.
- You would like someone to assist you in business succession planning.

- You would like the advice of a professional financial planner who has genuine concern for the success of your business now and in the future.

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