The Value of Professional Advice

WANDA FOREST
Financial Advisor

Since 2003, Wanda has served in the financial services industry and has continually upgraded her professional designations.

As a Certified Financial Planner (CFP) Wanda provides the expertise and professional network to assist clients with all aspect of their wealth planning.

Along with her team, she strives to provide exceptional service and select quality investments to support a long term plan for her clients and their families.

REFERRALS
are welcome

CONTACT

WANDA FOREST, CFP
Financial Planner

ABC Financial
1234 Main Street South, Suite 116
Anytown ON L0L 2A2

B 416.232.4444 | C 289.221.6766
wforest@abcFinancial.ca
ABCfinancial.com

PHILOSOPHY

"Using a holistic approach, my focus is to understand you, your family, your objectives, and act as your advisor, partner, and facilitator to help keep you on track." ~ Wanda

WHAT CLIENTS CAN EXPECT

- Qualified Support Staff
- Regular Scheduled Meetings
- Plan Monitoring
- Clear, Transparent Reporting
- Privacy & Confidentiality
- Access to Professional Network

SPECIALZED SERVICES

FINANCIAL PLANNING
Through the financial planning process, we help you assess your financial needs and develop strategies that will enable you to achieve your financial goals.

INVESTMENT PORTFOLIO DESIGN
Recommended solutions based on your individual investment profile, risk tolerance and future needs provide for a solid strategy that fits into your plan.

INSURANCE PLANNING
Implementing a strategic insurance plan protects your income and the financial security of those you love.

EDUCATION PLANNING
Using government programs can help your child graduate college or university with minimal debt.

ESTATE PLANNING & WILLS
Facilitates the orderly transfer of assets to your beneficiaries to provide security for your survivors while minimizing taxes. May involve external referrals.

RETIREMENT PLANNING
Developing a strategy designed to help you accumulating retirement assets in a tax-efficient manner, ensuring that you will have the resources needed during your retirement years.

ABC FINANCIAL
WEALTH BUILDING CANADA