The Value of Professional Advice

Commitment to Service

I am privileged to provide this wide range of complex and valuable services.

Clients Services

- Privacy & Confidentiality
- Transparent Reporting
- Qualified, Helpful Staff
- Regular Contact
- Plan Monitoring
- Invitations to Events

Bill Rexdale, CFP

Bill began his investment advisor career in 2012 and has continually upgraded his designations through professional development.

As Small Business Specialist, Bill can provide the expertise and professional network beneficial to business owner clients.

Exceptional client service is a priority for his team and selecting quality investments with a long term investment plan is the goal.

Outside of work Bill leads a busy life with his wife, Laura and their Labradoodle. Whether skiing in the winter or kayaking in the summer, Bill enjoys being outdoors.

Specialized Services Provided

Risk Management

Evaluating your financial risks and identifying strategies to avoid or minimize them is an essential first step.

Retirement Planning

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

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.

Small Business Specialization

We provide specialized services and referrals to maximize opportunities, so you can concentrate on building your business.

Tax Minimization

Tax minimization strategies are required in all stages of financial planning and are integrated with advice from outside specialists.

Contact

Bill Rexdale, CFP

www.website.ca

Certified Financial Planner

ABC Financial Planning Company
100 West Avenue East, Anytown, BC
604-611-1000 | 1-800-123-4567 | info@ABCFinancial.ca
facebook.com/Address

Accepting Referrals

ABC FINANCIAL
WEALTH BUILDING CANADA