Kate Seaside

FINANCIAL PLANNER

“As a financial professional, I take pride in providing my clients with superior service. Through a personalized and informed approach, I develop tailored financial strategies to help you reach your financial and life goals.”

OUR VALUE TO YOU

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

- REGULAR ONE-ON-ONE MEETINGS
- QUALIFIED SUPPORT STAFF
- INVESTMENT COMMENTARY
- DETAILED ACCOUNT STATEMENTS
- ACCESS TO PROFESSIONAL NETWORK

KATE SEASIDE CFP

Kate began her financial planning career in 2008 and has continually upgraded her designations through the years.

As a Certified Financial Planner, Kate can provide the expertise and professional network to assist clients with all aspect of their wealth planning. Exceptional client service is a priority for her team and selecting quality investments to support a long term plan is the main goal.

CONTACT

Your Financial Planning Company
1234 Main Street South, Anytown BC L0L 2A2
B 416.232.4444 | M 289.221.6766
kseaside@yfpc.ca | www.yfpc.ca

ABC FINANCIAL
WEALTH BUILDING CANADA

SPECIALIZED 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 financial plan.

TAX MINIMIZATION STRATEGIES

Tax minimization is a significant focus of your financial planning and is integrated with outside specialists.

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.

INVESTMENT MONITORING

In addition to tracking and analyzing shifts in the market and tax environments, we work closely with you to monitor changes in your life or changes in your assets.

REFERRALS ARE WELCOME