



RADA SHAW

FINANCIAL PLANNER

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A WEALTH OF EXPERIENCE

Since 2010, Rada has served in the financial services industry and has continually upgraded her professional designations.

As a Certified Financial Planner (CFP) Rada 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.

OUR COMMITMENT TO SERVICE

"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." ~ Rada Shaw

Professional Designations

Certified Financial Planner
Chartered Life Underwriter
Certified Divorce Financial Analyst

Client Support

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

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

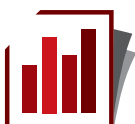
Tax minimization strategies are required in all stages of financial planning and are integrated with advice from outside specialists.



INSURANCE PLANNING

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

Referrals Accepted



ABC FINANCIAL
WEALTH BUILDING CANADA

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