SARA STONE CFP
FINANCIAL PLANNER

Sara began her financial planning career in 2004 and has continually upgraded her designations through professional development.

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

Sara takes a holistic approach to financial planning and investing with her clients. As Business Owner Specialist, Sara can provide the expertise and professional network beneficial to clients with these unique needs.

As an active community member, Sara is a Rotarian and serves on the board of Anytown Girls Minor Hockey Association. She can often be seen cycling to work in the summer months.

SARA STONE, CFP
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REFERRALS ARE WELCOME

Your Financial Planning Company

THE VALUE OF PROFESSIONAL ADVICE

SARA STONE CFP
FINANCIAL PLANNER

Your Financial Planning Company

COMMITMENT TO SERVICE

As a financial professional, I take pride in providing my clients with superior service. Through a personalized and informed approach, I work with you to 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
- ONLINE ACCOUNT ACCESS
- 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.

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 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.

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.

TAX MINIMIZATION STRATEGIES

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

SMALL BUSINESS SPECIALIZATION

Business owners and private corporations have unique needs. We provide specialized services and referrals to maximize opportunities, so you can concentrate on building your business.

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.

HIGH NET-WORTH WEALTH PLANNING

We provide highly specialized counsel in the areas of high-net-worth financial, tax, estate and business transition planning to help you achieve what matters most to you.