SERVISS
WEALTH

Thank You For Diving Deeper.
The below is an in depth breakdown of the many personalized conversations we have with clients:
What You Want. What Your Have. What It Means.

Comprehensive Plan Review

- Evaluate Your Lifestyle, Goals, and Major Life Events – Tailor your plan to accommodate desired changes, whether it's more leisure, increased savings, slowing down, spending adjustments, or creating additional income and wealth.
- Personalized Asset Map – Condense all your financial elements into a visually organized, one-page snapshot.
- Cash Flow Analysis – Scrutinize your personal budget, providing insights and suggestions for improvements.
- Risk Management Plan – Conduct an in-depth examination of existing insurance policies, offering advice on necessary updates.
- Estate Planning Review – Ensure alignment and consistency between your Will, Power of Attorney, and Representative Agreement with your financial products.
- Retirement Income Plan – Develop a comprehensive plan covering savings, real estate, income sources, spending, tax considerations, Canada Pension Plan, and variables specific to your situation.
- Financial Priority Map – Outline strategic focal points for the next 30 days, 6 months, 1 year, and beyond.
- Spousal Alignment on Financial Goals – Facilitate a discussion to ensure both partners are on the same page regarding financial objectives.
- Real Estate Planning Discussion – Deliberate on considerations based on your goals.
- Tax Plan Review – Coordinate discussions with your accounting, legal, and banking teams to optimize your tax strategy.

Risk Management

- Thorough Protection and Risk Assessment: A comprehensive analysis revealing gaps and opportunities in your coverage.
- Tailored Insurance Strategies: Designing strategies that suit your specific needs.
- Estate Planning: Crafting a straightforward estate plan with a focus on simplicity and tax mitigation during your lifetime and upon death.

Wealth Building Strategy/Investment Strategy/Portfolio Analysis

- Wealth Creation and Preservation: Reviewing the optimal strategy for building and safeguarding your wealth, particularly through business ownership and acquiring quality assets.
- Strategic Savings Plan: Devising a personalized savings plan, potentially involving a refined investment strategy.
- Investment Portfolio Review: Offering insights into your current investment statements, holdings, fees, dividends, and risks.
- Investment Policy Statement: Developing a roadmap for prudent investing aligned with your objectives and risk tolerance.
- Custom Tax Planning: Coordinating your investments with other holdings and your corporate structure for tax optimization.
- 24-Hour Access: Providing swift access to a portfolio manager and Serviss Wealth answers within 24 hours.

Business

- Shareholder Agreement and Funding Assessment:
  A comprehensive review of shareholder agreements, available funding for buyout scenarios, and partnership dynamics.
- Corporate Life Insurance Policies: A thorough examination of any existing corporate life insurance policies.
- Corporate Financial Priority Map: Strategic guidance on where to focus your corporate financial efforts.
- Holdco/Opco Planning: Optimization of money flow between corporations to enhance efficiency.
- Group Benefits and Commercial Insurance Review:
  A comprehensive assessment with specialists in group benefits and commercial insurance.
- Business Partnership Risks: Evaluation of risks associated with business partnerships.
- Exit Strategy Planning: Developing plans for a smooth exit from your business.
- Efficient Corporate Meltdown Planning: Strategizing for winding up a HOLDCO after selling.
- Business Partner Counseling: Offering guidance and support to business partners.
- Business Succession Planning: Coordinated planning with an advisor, business broker, and mindset counselor if desired.
- Estimate of Real Estate and Business Value Plan: Providing estimates for real estate and business values to facilitate partner discussions or explore retirement ideas.

Beyond Wealth

- Conversations Around Confident Spending: Giving yourself permission to spend more confidently.
- Spending Accelerator Model: Determining if you could spend more while staying on track financially.
- Private Health Package:
  Private Healthcare Discovery Meeting and Ultimate Health Vision.
  Comprehensive health assessments, including blood tests, full-body MRI, physical tests, fitness training, movement evaluation, nutrition advice, hearing tests, and eye tests.
  Natural Doctor Supervised Supplement Regimen.
  Collaboration-Based Spousal Relationship Coaching.
  Wealth Mindset Coaching.

Updated Blueprint and Implementation

- Account Administration: Comprehensive management of all aspects related to your accounts, including contributions, withdrawals, changes, and tax documents for accountants.
- Retirement Forecasts: Unlimited scenarios for retirement dates and income.
- Personalized Step-by-Step Action Plan that Evolves with Your Life Changes.
- Implementation and Review of Appropriate Insurance Strategies.
- Unlimited Financial Q&A.