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Financial Advisor

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Industry: Financial Planners, Professionals, Banks and Insurance

Towns: Salmon Arm Last Updated: July 21, 2022

ABOUT

Life is constantly changing, which is why you need a plan, and a pro-active advisor, that can adapt with your evolving needs and goals.

We help you create a financial plan – an IG Living Plan $^{\text{\tiny{M}}}$ – that adapts and changes as your life does.

Our goal? To improve your financial well-being and help you make decisions for today and tomorrow that allow you to embrace all of life's possibilities.

At IG Wealth Management, financial planning is a group effort. First, we will meet to discuss your immediate goals and long-term objectives. Then our team of experts, who specialize in investment, retirement, tax and life planning and more, will help make sure you're set up to meet all your life's goals.

My role is to help you set appropriate planning targets, identify gaps, highlight opportunities and provide you with a comprehensive financial plan that synchronizes all aspects of your financial life, including tax, retirement planning, cash management and more.

 $Studies^{\star} show that clients of financial advisors tend to start saving earlier and have higher net worth. \\$





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 $We {\it are honoured to be Living and Working on the Traditional, Ancestral and Unceded Lands of the Secwepemc People.}$

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HELPFUL LINKS

Shuswap Economic Development Website

https://shuswapecdev.ca/

CBC news

https://www.cbc.ca/news/canada/british-columbia

South Shuswap Scoop newsletter

https://www.shuswapscoop.ca

North Shuswap Kicker newsletter

https://www.kicker.ca

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