

The Value of Professional Advice

COMMITMENT TO SERVICE

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

SUMMARY OF VALUE

- ✓ Qualified Support Staff
- ✓ Regular One-on-One Meetings
- ✓ Invitations to Seminars & Events
- ✓ Online Account Access
- ✓ Detailed Account Statements
- ✓ Professional Advisory Network

ACCEPTING REFERRALS



**BILL
REXDALE**

Bill began his investment advisor career in 1998 and has continually upgraded his designations through professional development.

As Small Business Specialist, Bill can provide the expertise and professional network beneficial to business owner clients.

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

Outside of work Bill leads a busy life with his wife, their two boys, and Labradoodle. Whether skiing in the winter or kayaking in the summer, Bill enjoys being outdoors with his family.

SPECIALIZED SERVICES PROVIDED



RETIREMENT PLANNING

Developing a strategy designed to help you accumulate retirement assets in a tax-efficient manner, ensuring that you will have the resources needed in future 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.



INSURANCE PLANNING

By putting a strategic insurance plan into place, the financial security of the people most important to you is now protected.



DEBT MANAGEMENT

Solutions were designed to help you better manage and reduce your overall debt, saving you on interest costs.



EDUCATION PLANNING

Helping to pay for post-secondary school can help give your child the advantage of graduating with minimal debt, or even debt-free.

CONTACT

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