Catalyst

Wealth Planning Services

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Helping you achieve your financial goals is our passion

For most people, wealth comes with a sense of responsibility and a desire to preserve, protect and where practical, grow their wealth.

Through our planning process, we help you identify and define the financial goals that are most meaningful to you today, while setting the ground work for building a relationship that will allow us to address your needs into the future.

Building enduring client relationships is our commitment.

PROACTIVE AND DEVOTED SERVICE
We will step into your shoes, try to anticipate your needs, and make ourselves available to you anytime so you receive the undivided, individual attention you deserve.

EXPERTISE AND TEAMWORK
Our unified team of experienced professionals are dedicated to making a difference throughout your life with our integrated financial approach, energy and highly personalized service.

FREEDOM OF CHOICE
As an independent fee based firm, we have access to a broad base of financial products and services. With the depth and quality of options available to you, we can customize the solutions that are best for you.

A LASTING PARTNERSHIP
The best financial decisions are made based on goals and objectives that are clearly identified and revised as life changes. We do not offer a one-time product, but a commitment to help you make the best financial decisions throughout your life.

FINANCIAL MANAGEMENT
On an ongoing basis, we identify the strategic issues that need to be addressed for your situation and provide you with specific recommendations that we help implement.

Practice Areas

TAX PLANNING
Our talented team of professionals at Catalyst are experts at providing sophisticated tax minimization strategies for you.

ASSET MANAGEMENT
Our fully-integrated and customized asset management and investment consulting program is designed to preserve and grow your wealth.

RISK MANAGEMENT & INSURANCE PLANNING
With greater wealth comes the increased exposure to potential liabilities. We help you manage this risk so you can protect your family, business, assets, income stream and wealth distribution objectives.

BUSINESS SUCCESSION & RETIREMENT PLANNING
Most family businesses do not survive beyond the first generation due to family, retirement, legal and tax issues. We consult with business owners to plan and implement a course of action that will ensure your business succession and retirement goals are achieved.

ESTATE, TRUST & WEALTH DISTRIBUTION PLANNING
We develop and execute an estate plan that clearly outlines your wishes, protects your family, minimizes estate and income taxes, and preserves your legacy for future generations. If you have philanthropic desires, we can design creative solutions that enable you to administer a charitable legacy, while maximizing the social and economic benefits.

For more on Catalyst's Wealth Planning Services, please contact your trusted Catalyst advisor at 403-296-0082.

Catalyst provides accounting, assurance, taxation, wealth planning and corporate advisory services.

Catalyst
thecatalystgroup.ca