

Approach retirement with financial confidence.



As you approach retirement, it's important to get a clear picture of your situation. From there, you can enjoy this special time with well thought-out and personalized income strategies designed for your ideal lifestyle and turn your retirement vision to reality.

Investment Advisor Barb March-Burwell can help you make the right changes to your plan.

- Preserve the value of your existing investment savings with time-tested, conservative strategies
- Maximize the next five to 10 income generating years, so you can enjoy the retirement lifestyle of your choice
- Organize different income generating investments including RSPs and company pensions to maximize your after-tax income
- Understand the technicalities of your pension program so you don't miss opportunities to make the most of your savings
- Use tax-deferring investments like LIRAs, RSPs, RIFs, and insurance annuities

- Create efficient estate plans so your loved ones are financially well prepared

IT'S TIME TO ENJOY YOUR RETIREMENT

For nearly 20 years, Barb has been guiding pre-retirees successfully into retirement. Barb structures portfolios so they preserve your capital while generating the most tax-efficient income stream for your retirement.

In addition, Barb can help you plan your estate and leave a lasting legacy to help your loved ones or your favourite charity. So you can enjoy your retirement without financial worry.

Contact Barb for a complimentary retirement assessment.

Barb March-Burwell
Investment Advisor
(306) 777-0543
barb.march-burwell@rbc.com
www.barbmarch-burwell.com



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