The Page and Associates Ltd. planning team receiving the Top Choice Award for Top Financial Advisor of 2011 in Richmond Hill

They Wrote the Book on Financial Plannning

Want to earn higher returns and sleep better at night? This is the company you have been looking for.

TUCKED AWAY IN A glass tower in Richmond Hill is a small private wealth management firm that wrote the book on financial planning. Page and Associates Ltd. was founded 30 years ago by John A. Page, a pioneer in the delivery of professional financial planning services. The firm's client service process was developed and refined over many years, and is the basis for much of the Advocis Best Practices Manual, used by thousands of financial professionals across Canada.

A team of 10 advisors and staff continue to build on the tradition of excellence. Members of the firm have won numerous industry awards over the years, and client satisfaction statistics are impressive. It's no wonder they are 2011's Top Choice for Financial Advisor in Richmond Hill.

"Studies show that people with a written financial plan earn higher returns, and have less stress. We figured most people would want those benefits" says Frank Miemiec, VP Operations. He is surprised at how many of the firm's new clients don't get this service from their former advisors, or thought what they had was a financial plan, but was only an investment policy statement or value projection.

Rick Page adds "Few of our competitors offer comprehensive financial planning services that bring together tax planning, cash flow management, risk management and investing, to ensure that clients' retirement and estate goals can be achieved in the most effective and tax-efficient way possible." He explains that the firm's team-based approach allows them to deliver superior service because they have in-house experts in various fields contributing to the development of their clients' plans. "We have a CA and MBAs in house, and an extensive network of professionals such as lawyers and mortgage brokers to draw on when our clients don't already have established service providers in these areas."

Tax-efficiency is one of the main benefits of a financial plan. Jonathan Flawn, a Certified Financial Planner and Page's in-house Chartered Accountant, says "Taxes are very complex, and most of our clients are not experts in this area. Many are not taking advantage of all the deductions and credits that they could be using, and most have not structured their investments to minimize tax exposure. We take great care to build the customized financial forecasts needed to support the long-term planning strategies that will reduce our clients' lifetime tax burden."

If this sounds like the level of service you'd want for your own financial planning, you can arrange for an Initial Assessment and Evaluation meeting and walk out with a complimentary report. Donald Page explains, "We still offer our Initial Assessment on a complimentary basis, so that there is no risk for someone looking to find out more about how we can help them in their specific situation. Even clients who choose not to engage us as their advisors say they have benefitted by going through this process with us."

Sounds like a good plan to us!

You can contact Page and Associates Ltd. at 905-884-5563 or visit their website at www.askpage.com