



INTEGRATED  
WEALTH  
ADVISORY

# INTEGRATED STRUCTURED PLANNING FOR YOUR FINANCIAL SUCCESS



Investments – RRSP, TFSA,  
Non Registered, RESP, GICs  
Complete Financial / Retirement Plans  
Tax Planning (personal and corporate)  
Tax Return Preparation  
Advanced Life Insurance Planning  
Wills & Estate Planning  
Business Succession Planning

261 Martindale Rd. Unit 1,  
St. Catharines, ON L2W 1A1  
karen@iwawealth.ca & wendy@iwawealth.ca  
905-684-3332 • iwawealth.ca

At IWA our experienced financial advisors understand that each client's financial objectives are unique. We are dedicated to designing customized financial and investment plans that will help you achieve financial success.



## OUR UNIQUE AND INTEGRATED STRUCTURE ALLOWS US TO PROVIDE:

- Analysis of your current financial picture
- Discussions regarding your financial goals and objectives
- Development of a concise roadmap to achieve those goals
- Investment with professional money managers
- Ongoing review and support of your personal plan
- Access to integrated services with CPA firm for income tax and estate planning



261 Martindale Rd. Unit 1,  
St. Catharines, ON L2W 1A1  
karen@iwawealth.ca & wendy@iwawealth.ca  
905-684-3332 • iwawealth.ca