

PERSONALIZED SERVICE FOR

members nearing retirement and retirees



I can offer a financial strategy that reflects your financial reality and will help you achieve your goals.

- Optimizing tax strategies¹
- Planning an estate¹
- Evaluating insurance needs¹

Members nearing retirement

- Planning for retirement¹
- Managing credit
- Buying a second home
- Creating a financial plan

Retirees

- Managing retirement income
- Drawing on investment income
- Maintaining a balanced budget
- Financing your grandchildren's education

Expertise

- In the financial industry since 2012
- Regular professional development training

Commitment

- Understand your financial situation, plans and goals
- Develop a trusting relationship with you
- Adapt my financial advice to your needs
- Follow up regularly about your specific needs
- Review your financial strategies based on important life events



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 desjardins.com/caissedelapommerai

Visit our  page

¹ Some services may be provided by internal or external Desjardins partners.

² Mutual Funds Representative for Desjardins Financial Services Firm Inc.