

Your financial planner

Why you need a financial planner*

From one stage of life to the next, changing circumstances call for different financial solutions. A financial planner can help you to achieve your goals with a plan that is tailor-made for you.

Unique expertise

Our experienced financial planners rely on expertise gained through ongoing professional training to understand your needs and develop a financial plan in line with your objectives.

Good planning can help you achieve financial independence and increase your wealth.

A rigorous process for a holistic strategy

The role of your financial planner is to optimize every aspect of your financial situation. They listen and offer you support, information and advice. The more you tell them about your financial needs, priorities and goals, the more effective the strategy they develop for you will be. They will analyze your financial, professional and personal situation to produce a made-to-measure solution.

➤ To learn more, visit nbc.ca/financialplanning.



Financial planning demystified!

Check out our articles on nbc.ca/advice for more helpful tips. You will find a wealth of information on the 7 pillars of financial planning:

- > Planning your retirement
- > Making the most of your investments
- > Creating an estate plan and will
- > Getting the right insurance
- > Mastering personal finances
- > Paying less tax
- > Ensuring your plan is legally sound

* Financial planning services are offered by National Bank Investments Inc., a wholly owned subsidiary of National Bank of Canada. National Bank Investments Inc. is registered as a financial planning firm in Quebec.

A comprehensive solution

Our certified financial planners draw on their in-depth knowledge of several key areas to create well-designed financial plans. Whether it's retirement planning, estate planning, investment strategy or the assessment of insurance needs, every decision in these specialized areas will affect your net worth, available cash and tax situation.

The financial plan is the cornerstone of your relationship with your financial planner.

