David Bardal, CLU®, CH.F.C.®, CFP®
Senior Financial Planning Advisor &
Juana Baldwin, CFP®, CHS, RRC
Financial Planning Advisor
Assante Financial Management Ltd.

Business Owners and Professionals Luncheon Series

It's all about Trusts: How are trusts being used today?

Join us for lunch as Seth Nerman discusses …

Over the past 5 years, there has been an unprecedented amount of changes to Canada's tax laws. Many of these changes have significantly impacted what most tax professionals had once considered bread and butter trust planning. While some trust planning has gone the way of the dinosaurs, most has evolved and adapted to these recent tax changes. New trust strategies have also been created in reaction to the current tax planning environment. During this session, Seth Nerman LLB CFP, Regional Vice-President, Wealth Planning, will be discussing some of the more common types of trusts used in planning today, as well as their many benefits and applications.

We hope you can join us for this session – and why not bring a friend or colleague?

Thursday, March 28, 2019
12:00 PM -1:30 PM
Winnipeg Winter Club
200 River Avenue
Winnipeg, MB

Special Guest Speaker:
Seth Nerman
Regional Vice-President, Wealth Planning
Assante Private Client, a division of CI Private Counsel LP

RSVP to Tammy Shpak at 204-977-8067 or via email at tshpak@assante.com by **Friday, March 22, 2019**. Please include the total number of guests!
Lunch will be served. Do not hesitate to pass this invitation on to your associates, friends, and family. Please advise us of any allergies or food intolerances.

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