CASTLEMARK
WEALTH MANAGEMENT

"We're there for you through life's changes, through market ups and downs, helping you adapt and responding to your needs. ADAPTIVE. RESPONSIVE. WITH YOU ALL THE WAY."
– Robyn

CASTLEMARK INTEGRITY FINANCIAL PLANNING

"Call me – I'm here to help."

ROBYN K. THOMPSON, CFP®, CIM®, FCSI®
PRESIDENT

Castlemark Wealth Management Inc. is committed to the highest levels of personal service. It's a process we call Castlemark Integrity Financial Planning. We'll meet with you personally (in fact, we insist on it), and listen to what you want. We believe that good financial planning starts with good listening. When it comes to assessing your needs, we're all ears. And we won't stop listening.

The objective of a good financial plan is to maximize the value of your financial resources to achieve your goals. That's a bit like a complicated jigsaw puzzle. Our job is to help you fit the pieces together to reveal your personal financial picture. But unlike a jigsaw puzzle, your financial plan is not static. Over time, your picture will change. The pieces will fit differently as you progress through life's many stages. At Castlemark Wealth Management Inc., we're dedicated to staying with you along the way and keeping that picture in focus.

PLANNING FOR LIFE As a business person, executive, or employee, you put a lot of thought and planning into your ▸▸

TODAY, TOMORROW… WE'RE THERE FOR YOU

work. That's important. But many of us neglect to put the same kind of effort into something even more important – our own financial affairs.

That's where we come in. Casatlemark Integrity Financial Planning looks at every facet of your personal and family financial needs – security, capital growth, retirement income, protection and tax planning.

CASTLEMARK INTEGRITY FINANCIAL PLANNING

- SET GOALS. This is the foundation for any plan. We'll work with you to what's realistic, what's attainable. You might be surprised! Most people underestimate what they can achieve.
- ASSESS YOUR SITUATION. You need to know where you are now before you can set a direction. We'll help you gather all your current financial information, sort it, organize it, and get it up to date.
- ANALYZE. We'll do the heavy lifting here. We'll weigh your current situation, look at your needs, quantify your resources and apply them to your goals. The result is your personal financial roadmap.
- GIVE SOLUTIONS. If the "Analysis" is the "how" part of your plan, "Solutions" are the "what". We'll recomment courses of action for you, explaining how each element fits into the overall plan.
- TAKE ACTION. We'll help you implement your strategies, from investment accounts to tax-planning to insurance needs. We'll ensure your financial plan gets started and stays on track.

FULL SUITE OF SERVICE – THE BEST IN:

- Personal and family financial planning
- Portfolio management and investment counseling
- Strategic tax planning
- Individual Pension Plans
- Small business compensation consultation
- Retirement income strategies
- Wills and estate planning
- Regular performance reports and communications
- Plan and portfolio reviews and updates
- Accessibility – face-to-face, telephone, or online