Create your own tomorrows

Financing your child's education?
Building a successful business?
Providing financial security for your family?

Milestone Wealth and Estate Planning Group knows financial security planning is about more than just retirement. It's about making your dreams come true.

To find out more about how Milestone Wealth and Estate Planning Group can help point you in the right direction, please contact us today.

The way we work

Helping our clients achieve their goals and dreams at all stages of life



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Our planning process

We use a planning process that helps our clients achieve their goals and dreams, whatever they may be. This process allows us to:

- Gain a better understanding of what financial security means to you
- Analyze your situation and identify gaps
- Build a plan to help you achieve your short and longterm goals and dreams
- Review and monitor your financial security plan regularly to help ensure it meets your changing needs

Our foundation of strength and stability

Milestone Wealth and Estate Planning Group is pleased to represent Freedom 55 Financial, a division of London Life Insurance Company.

London Life has been helping Canadians meet their financial security needs since 1874.

Through Freedom 55 Financial, Milestone Wealth and Estate Planning Group offers London Life's own brand of savings and investments, retirement income, life insurance and mortgages, as well as a broad range of financial products from other financial institutions.

Risk management

Death

Disability

Emergencies

Wealth accumulation

Retirement

Liquidity

Opportunities

Diversification

Wealth distribution

Death

Disability and health

Retirement

Taxes

Family and business legacy

Supported by a team of experts

Through Freedom 55 Financial, Milestone Wealth and Estate Planning Group is supported by a team of experts in:

- Retirement and investment planning
- Life insurance
- Banking and mortgages
- Living benefits (individual critical illness and individual disability insurance)
- Employee benefits

Helping you achieve your goals and dream at all stages of life	S

