Overview of Services

PLANNING FOR LIFE. CREATING FOR GENERATIONS.

Building and preserving wealth is more than just a number, it represents the freedom to uplift your entire family, create a meaningful legacy, and ensure loved ones can continue to do so for generations to come. For us, understanding your goals is only the first part of your financial plan—it's the motivations behind them that make each one unique.

INVESTMENT MANAGEMENT

Public & Private Investment Solutions
Comprehensive strategies founded on proven, repeatable processes for tax-efficient outcomes.

Portfolio Management
A professionally managed portfolio, customized to your preferences, risk tolerance, and circumstances.

Asset Allocation
Global diversification that goes beyond fixed income and equities, capitalizing on private securities.

Trading/Rebalancing
As discretionary managers, your wealth can be mobilized instantly to capture emerging opportunities as they arise.

Risk Management
Prioritizing strategies that recognize *growing* client capital is only the first part of *preserving* long-term wealth.

Wealth managed with your entire family in mind.

WEALTH PLANNING

Advanced Financial Planning
Leveraging legal, regulatory, and financial expertise to make building wealth convenient, not complicated, no matter your circumstances.

Cross-border Solutions
Facilitating cross-border lifestyles through comprehensive wealth management across North American regions and regulations.

Family Governance
Establishing a framework of shared values for the future of your family enterprise.

Wealth Transfer
Minimizing tax obligations for beneficiaries utilizing trusts, wills, and other estate planning tools.

Insurance Planning
Increasing liquidity and optimizing your estate plan for peace of mind through annuities, life insurance products, and more.

Philanthropic Planning
Making a meaningful difference for an important cause while also reducing tax burdens.

Estate Planning
Crafting a legacy that ensures your wishes are followed, wealth preserved, and story remembered.

Tax Planning
Keeping more of what you earn through tax-efficient strategies to further enrich your life.

YOUR NORTH AMERICAN, INDEPENDENT, FAMILY WEALTH ALTERNATIVE

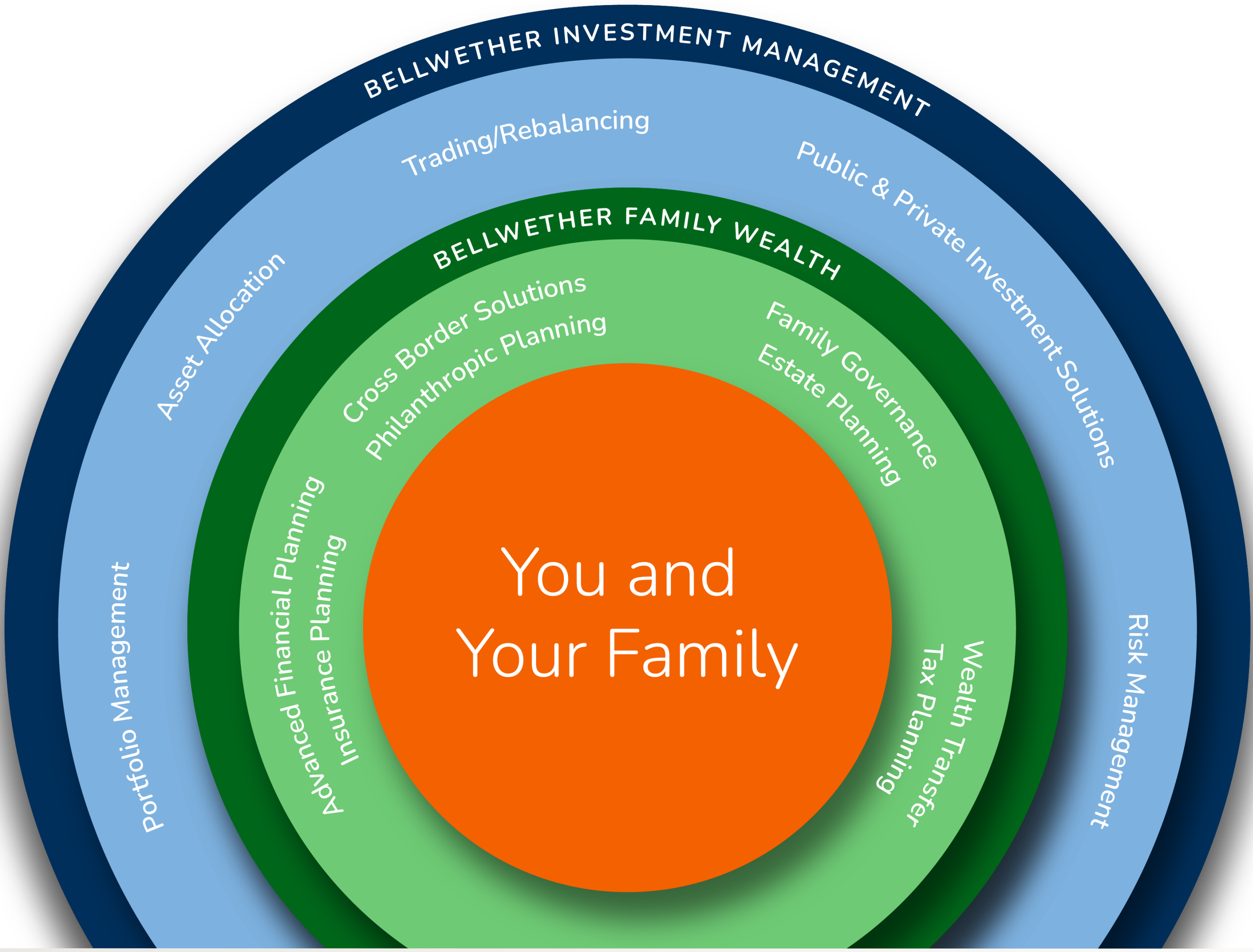
Alternative

al-ter-na-tive /ȯl-ˈtər-nə-tiv/

1. Different from the usual or traditional way something is done
2. A unique and innovative approach or solution

By collaborating with a Portfolio Manager, Family Wealth Advisors are given the time to give you their undivided attention. They go a step further than just asking where you want to be in life; they know when you'll arrive, how to handle detours, who is coming along for the ride, what the underlying goal is, and most importantly, why it matters.

Wealth without a roadmap leads nowhere. With the Family Wealth Alternative, your portfolio and financial plan can take you where you want to go.



For further information please contact your Family Wealth Advisor or visit our website at: bellvest.ca