

Complimentary 2 Hour Financial Planning Session

- ▶ We are offering a complimentary 2 hour financial planning session to any individuals interested in a second opinion with regards to investments, retirement, estate & tax planning.
- ▶ We are extremely passionate about educating clients with regards to concepts and terminologies used in our industry. Topics include fee structure of investments, market overviews, taxes and more.

We've Grown Again...



David Gorveatte
CFP®, CPCA,
Owner, Certified
Financial Planner®



Colin Smith
Investment Funds
Advisor & Analyst



Terry Murphy
Insurance Specialist



**Janice LaPointe
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Mutual funds and/or approved exempt market products are offered through Investia Financial Services Inc.



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