

The Prosperity Blueprint

A strategic guide for affluent families seeking tax efficient growth and meaningful impact.



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Why Holistic Planning Matters

For families with \$1M+ portfolios, true prosperity goes beyond returns. It's about clarity, confidence, and alignment with your values.

This blueprint outlines seven strategies to help you grow and protect wealth while creating a legacy that lasts.



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7 Strategies for Tax-Efficient Growth

- **Advanced Tax Optimization:** Maximize RRSP, TFSA, and consider IPPs for business owners.
- **Values-Aligned Investing:** Integrate ESG and impact portfolios that reflect your principles.
- **Retirement Income Layering:** Structure income streams for tax efficiency and stability.
- **Estate Planning Essentials:** Wills, trusts, and beneficiary reviews to safeguard your legacy.
- **Philanthropy & Legacy Design:** Create giving strategies that amplify your impact.
- **Risk Management for Significant Wealth:** Ensure adequate coverage for life, health and liability.
- **Family Governance & Next-Gen Education:** Prepare heirs with clarity and confidence.



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Ready to align your wealth with purpose?

Schedule your Private Wealth Strategy Session today.
Visit simplicityfinancial.ca or call us to begin your journey toward clarity, confidence, and impact.



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