

FINANCIAL PLANNING



A WEALTH OF SERVICES AND EXPERIENCE

Jones DesLauriers' portfolio goes beyond insurance policies.

Our independent brokers provide the same quality of advice for your financial plans, including a wide range of insurance and investment products. We offer comprehensive programs that are customized to your one-of-a-kind situation. You will always get qualified, independent advice and a wide range of products that will set you on the path to building a financial portfolio that gets the job done.

Individual Planning

Jones DesLauriers will build a customized plan for you, based on your individual circumstances, taking into account your age, dependents, assets and your financial goals. We have the financial planning expertise to provide tailored products to meet your distinct requirements.

You want to be assured of a better future, for yourself and for your family. Our financial and life insurance professionals are here for you. We will take the time and work closely with you to find the right solutions for your needs, now and into the future.

Living Benefits

Long Term Care, Critical Illness, Disability Insurance, Health Care

Life Insurance

Succession and estate planning, term insurance, mortgage insurance, impaired health solutions, universal life, whole life, policy conversion and tax shelters options

Asset Accumulation

Tax sheltered savings, Registered Education Savings Plans (RESPs), Registered Retirement Savings Plans (RRSPs), Registered Retirement Income Funds (RRIFs), mutual funds, segregated funds, annuities and retirement and income funds strategies



Corporate Planning

Provision of a better future for our clients is the motivating force that drives our financial services professionals.

Key members of your organization, from managers to owners, are valuable parts of your past and your future. Financially securing them will help maximize your corporate plan and profit.

Buy Sell Agreements	Funding and tax strategies
Executive Compensation	Long term plans for senior personnel
Business Perpetuation	Tax effective funding of ownership transfer
Key Person Insurance	Coverage for critical employees
Employee Benefits	Geared towards cost containment
Living Benefits	Disability, critical, illness, long term care

Contact Us

Jones DesLauriers & Reynolds is an independent firm with access to a variety of financial products. We deal with only the most reputable service providers, which means you will receive only the best service and solutions to your individual financial planning requirements.

Call us toll-free to reach one of our broker representatives in your area to discuss your specific requirements and the value added services we can provide.

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1.877.232.9996
www.jdimi.com