Solutions tailored to your legal situation

Because everyone's situation is unique... and legal aspects are key.

As part of the financial planning process, we will analyze your personal situation from a legal perspective to determine, among other things, the legal information and documents likely to impact your plans.

Our offer: We will include your legal situation in the financial planning process.

Certain lifestyle situations (such as your marital status, family assets and the administration of property in the event of disability) could impact your personal finances as well as your life objectives. Our financial planning service aims to provide you with information concerning such situations, enabling you to make adjustments to your objectives.

Your advisor will therefore:

- Gather the necessary information
- Define any situations with potential legal consequences
- Analyze and evaluate possible legal consequences for your financial situation
- Design, together with legal specialists, strategies for reviewing your legal documents to ensure they are in accordance with your projects
- Monitor changes in your personal and financial situation, to ensure that the measures taken match your changing goals.

We add value

By ensuring that your financial plan reflects the legal aspects impacted by changes in your wealth situation. Capitalize on your advisor's global approach!

Our financial planners are registered under the licence of National Bank Securities, a wholly-owned subsidiary of National Bank of Canada.

Because you are unique

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