Estate Planning Solutions

Plan for the benefit of those dear to you!

Estate planning ensures that your loved ones are well-protected upon your death and establishes a framework for passing on your wealth, according to your needs, with no unnecessary delays and with a lower tax impact.

Because you are unique

Our offer: We will optimize wealth transfers to beneficiaries!

With an up-to-date and valid estate plan, your heirs will be spared fiscal and legal problems and your final wishes will be respected.

Your wealth management advisor will help you draw up an estate plan by:

- Carrying out an inventory of your assets and liabilities and calculating your estate's net worth
- Defining your estate planning objectives and drawing up a list of your wishes (beneficiaries and their respective inheritances, asset disposal methods, designated tutors for minors, etc.)
- Determining the financial needs of your spouse and heirs after your death, including your children's education, mortgage payments, etc.
- Calculating taxes and cash holdings at death

You can use this analysis to draw up an estate plan and ensure that your wealth will be shared according to your wishes.

We add value

Together with a specialist, we review your estate plan and your will to ensure that the measures taken reflect the changes in your personal objectives.

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

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WEALTH MANAGEMENT

18983-002 (2005/01/24)