



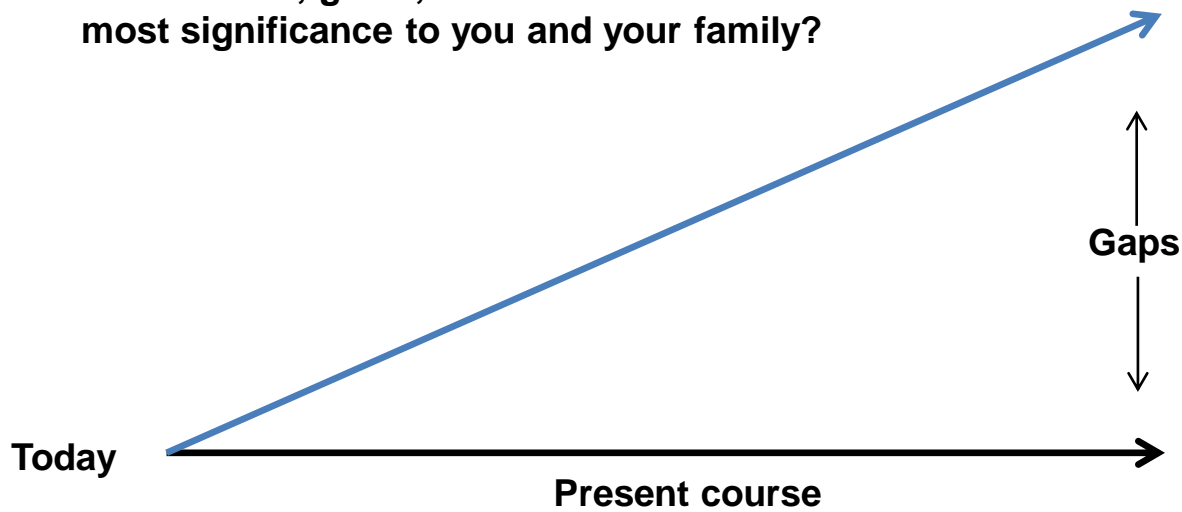
MARKEWICH FINANCIAL

The Alignment Conversation

and

the other stuff we do for business families.

What values, goals, and lessons are of most significance to you and your family?



Possible ideal future

- Family
- Faith
- Legacy
- Other

**BUSINESS
STRUCTURE**

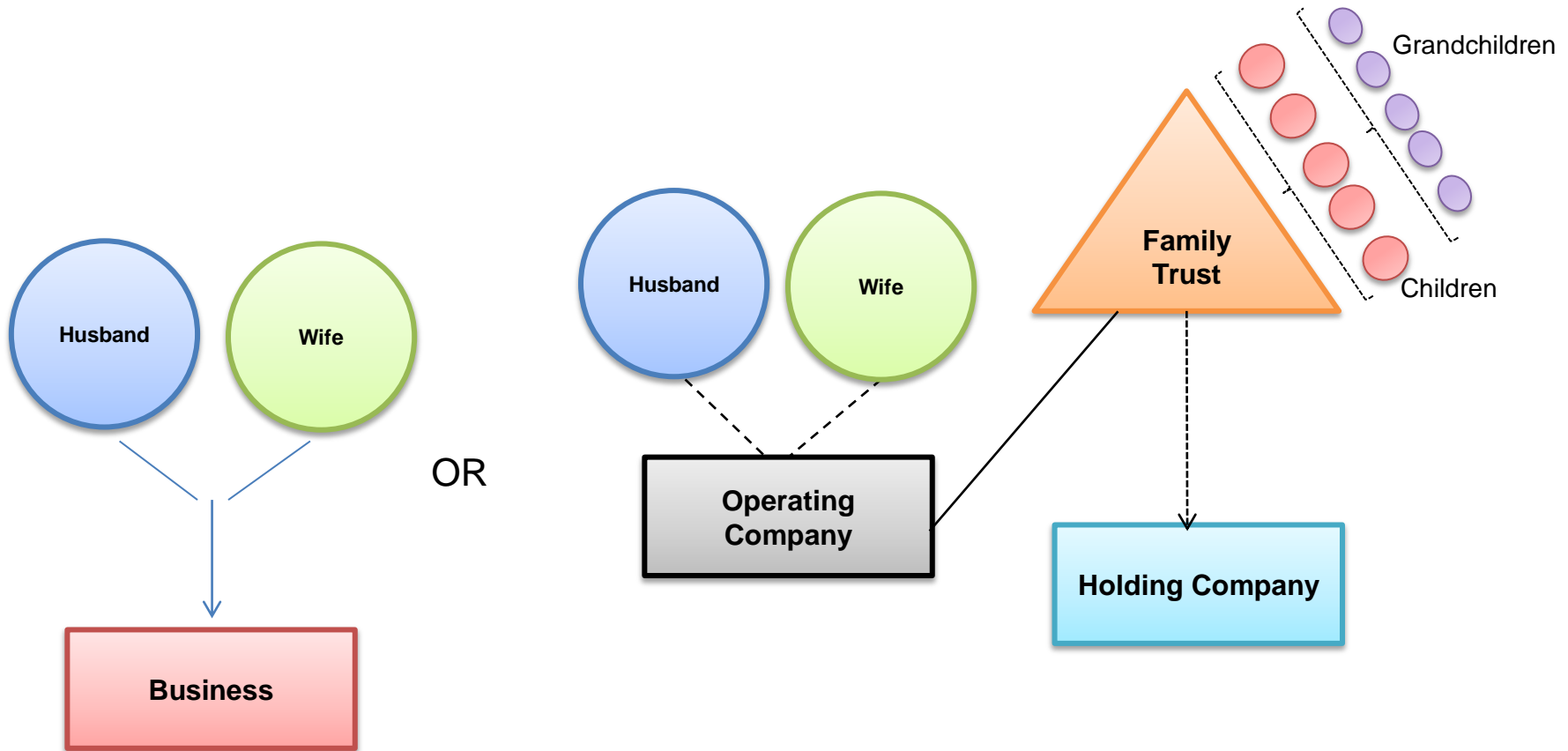
**WILLS &
TRUSTS**

INSURANCE

INVESTMENTS

PHILANTHROPY

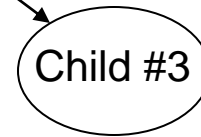
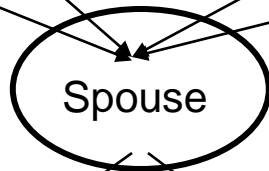
CORPORATE STRUCTURES



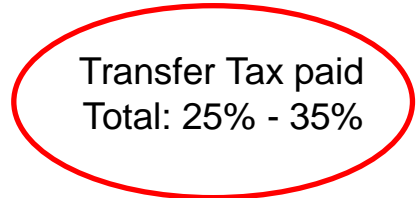
SIMPLE WILL / SIMPLE PLAN



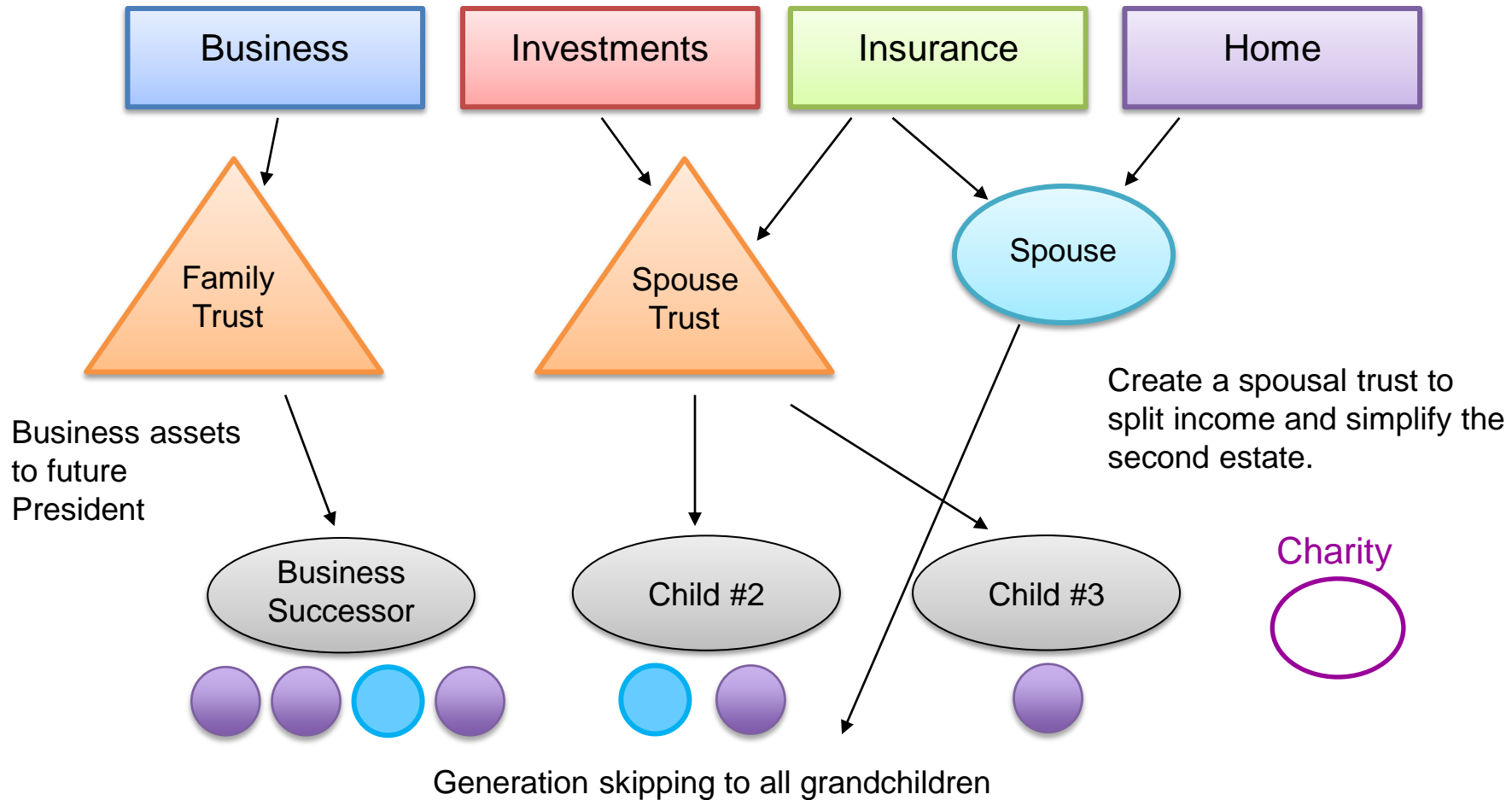
Ex: All assets to spouse, if living, then equally divided on second death.



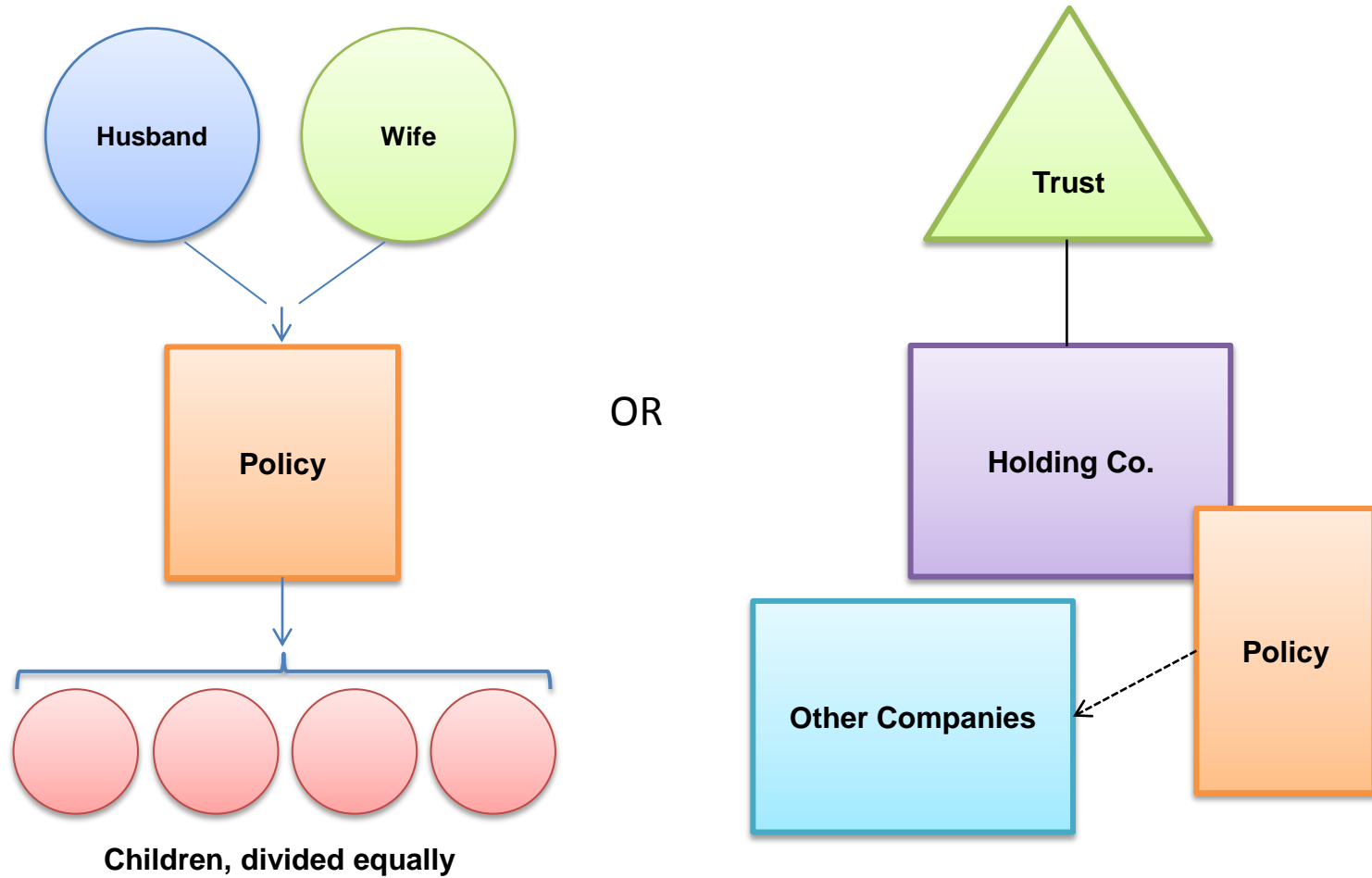
Tax



More structured WILLS & TRUSTS



LIFE INSURANCE



ASSET & PURPOSE ALLOCATION

What you have:

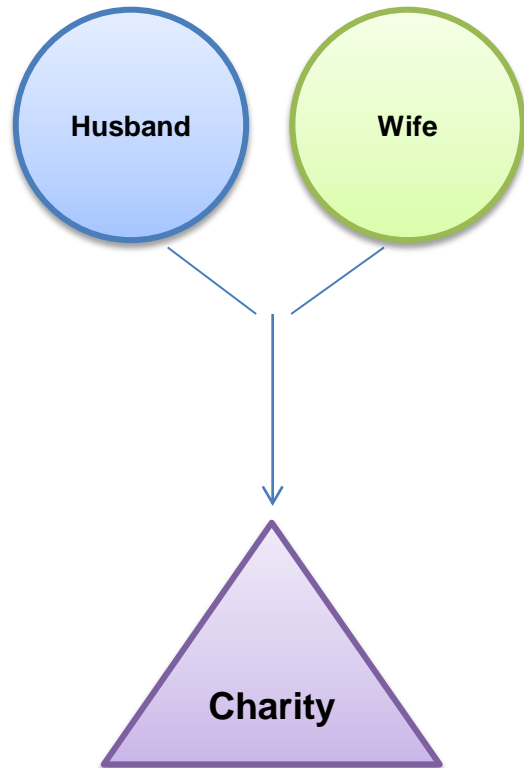
What it's for?

| TFSA, Reg, Non-Reg | Asset Class or Type | Value | Growth or Provide Income | Use now | In Estate |
|--------------------------|---------------------------|-------|--------------------------------|---------|-----------|
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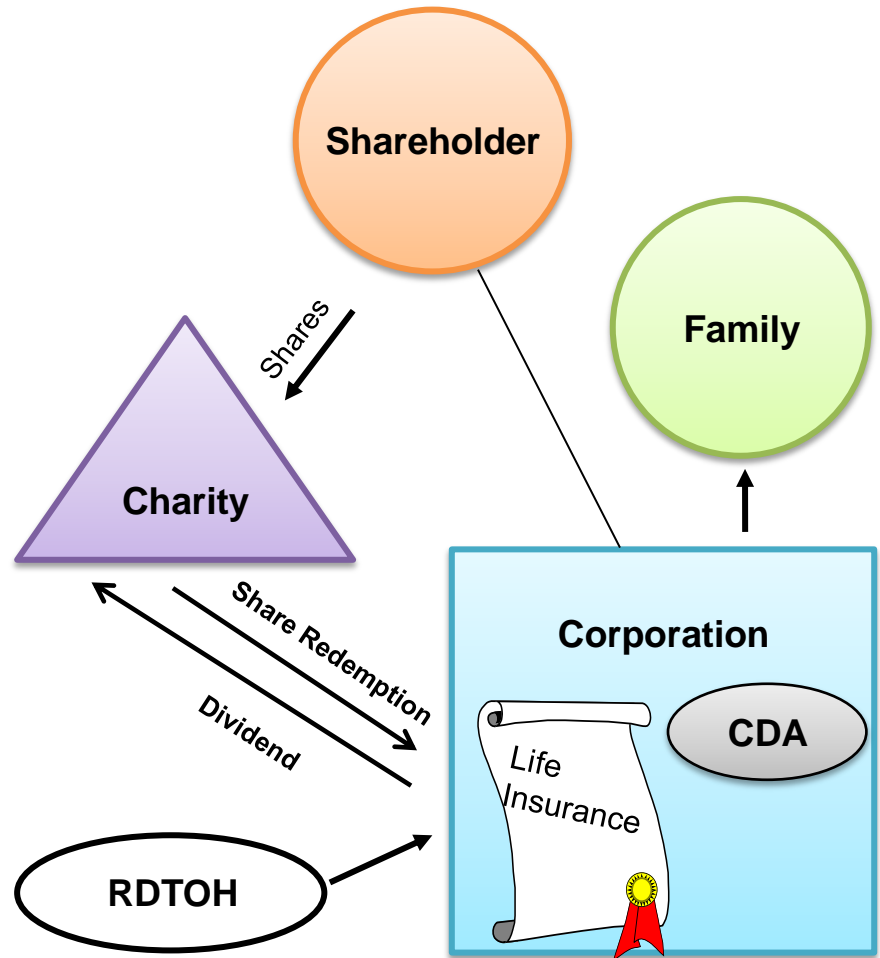
NOTES:

CHARITABLE PLANNING

Charitable Share Redemption



OR





TRANSFORMING LIFE'S WORK INTO LIFE'S LEGACY

1410 – 363 Broadway
Winnipeg, MB R3C 3N9

Office: 204.956.2262

Fax: 204.956.2262

doug@markewichfinancial.com

Markewichfinancial.com