

Hot News

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- Moving Office
- The Value of Advice
- New TFSA limit

Spring Update

Financial Planning is a year round process and life long journey.

2015 has been a great year for helping our clients through this process and on their journey.

We are looking forward to continuing to work with you over the rest of the year.

We are Moving!

After over 10 years on Sunray Street and 18 years in Whitby, we are moving. Debbie has sold the Commercial unit and it is time for change.

We are very excited to be moving to a great office in Ajax as of the end of May.

Our new address and phone numbers are:

**50 Commercial Avenue, Suite 200
Ajax, Ontario, L1S 2H5**

Phone: 905-427-4406

Fax: 905-427-4407

Toll Free: 1-844-427-4406



Contact Information:

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“An investment in knowledge pays the best interest.”

– Benjamin Franklin

The Value of Advice

Over the next few months we will be talking more about the Value of Advice; what should you expect from your relationship with a Financial Planner, how do we get paid and are you getting value for your money from working with MC Wealth Management.

Financial advisors enrich the lives of Canadian investors

Statistics show that investors who work with financial advisors have more than four times the financial assets than those who go it alone. Research also shows that having an advisor create a comprehensive financial plan in line with your goals and keeping you on track results in additional wealth and a brighter financial future. In fact, those who have a relationship with their advisor over 15 years save nearly seven times more than those who go it alone.

Are you getting the advice you need?

According to J.D. Power*, investors are most satisfied with advisors who help them set, track and reach their personal investment goals. Only you know what you need and what matters most to you. Work with an advisor to create a financial plan as unique as you are.

TFSA Limit increase

Are you aware that the TFSA contribution limit has increased? Subject to the federal budget being approved, the annual limit has increased from \$5,500 to \$10,000 retroactive to January 2015. This is a great way to get into long-term tax-free investing.

By the way, I am a fan of using the TFSA instead of an RRSP for your retirement investing if your income is under about \$35,000. Call for more information!