

Bringing you the best expertise

Barometer Capital Management is committed to providing you with a financial roadmap to grow and preserve your wealth for the establishment and continuance of your unique family legacy. If your wealth management needs require the complexity, we have partnered with Henderson Partners LLP to provide financial planning for our clients. Henderson Partners has specialized in Financial, Estate, Income and Tax Planning for over thirty-five years and is well known for the quality of the thorough and valuable advice they provide. They have built a solid reputation in the tax and financial planning field and we are proud to partner with them to help fulfill all the wealth planning needs of our clients. Together, we will provide stewardship and help you establish a personalized strategy that meets your goals.

For more information about our Financial Planning Services contact your Relationship Manager or:

info@barometercapital.ca

416-601-6888

Toll Free: 1-866-601-6888



Planning your finances with us.

barometer

We will guide you through the entire process

Client Engagement – The process of understanding your goals.

Discovery – The fact-finding process of establishing your current financial position.

Analysis – Where we evaluate the information gathered and analyse this in the context of what you want and need.

Presentation – Recommendations presented to you in the form of a detailed personal Financial Plan.

Implementation – Working with you and your preferred third party professionals to navigate the next steps.

Periodic Review – Revisiting the Plan as life changes.

Elements of a financial plan

