

## ABOUT ME



### Blake MacLeod

Financial planning is more than just numbers: it's the people and dreams behind the figures that matter the most. As an Assante Financial Advisor, I can help you gain peace of mind and achieve your dreams and goals for the future, whether it's a worry-free retirement, planning a business, sending children to college, fulfilling a lifelong ambition or leaving a legacy to your loved ones or a cherished cause.

Managing your wealth can be complex and time-consuming. I can help by simplifying your life by addressing all aspects of your financial well-being from investments and insurance to tax and estate planning. Supported by a team of professionals, including lawyers, tax accountants and financial analysts, I can help you make the right decision about your wealth and help you build the future you desire.

I apply my 10 years of experience to design a strategy for each client through a managed money approach. I find the right investments for my client's needs throughout the different stages in their lives.

If you are looking for a second opinion or financial solutions that will enhance your life, then please contact me for a confidential consultation.



### Blake MacLeod

Financial Advisor

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*Be well-advised.*

**Blake MacLeod**  
Financial Advisor

**Assante Financial  
Management Ltd.**



# complete financial advice

## What you can expect from your Assante Advisor

Complete financial advice helps you define your needs, priorities, goals and aspirations. It also empowers you by making you aware of the changes that are needed to meet your goals and helps you feel in control.

As an Assante Advisor, I am positioned to be a key resource to oversee several different aspects of your financial affairs, and can work with you to provide a customized wealth management plan. But I am not alone in this effort. I am supported by a team of professionals and work with them to encompass your financial planning, tax planning, risk management, and estate planning.

## OUR VALUE PROPOSITION



## You are unique, and so is your financial situation

At Assante Wealth Management, I work with you to take care of your investments, to save you money, and to prepare you for your retirement. We are here to ensure you and your family are well taken care of, now and in the future. As your trusted advisor, I look at the complete picture.

## Services

When we work together, you will receive truly integrated wealth management services that are professional, methodical, and firmly rooted in understanding your personal needs. As your dedicated Assante advisor, I can help you define your current financial situation and future goals, and implement a personalized plan to:

- Grow and protect your wealth with a customized portfolio
- Maximize your income through tax strategies
- Secure your future with detailed retirement advice
- Fund your children's and grandchildren's education needs
- Preserve and enhance your legacy

## Unparalleled Counsel

