



YOUR FINANCIAL PLANNING COMPANY
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Jared York

FINANCIAL PLANNER

"As a financial professional, I take pride in providing my clients with superior service. Through a personalized and informed approach, I develop tailored financial strategies to help them reach their financial and life goals." Jared York

COMMITMENT TO SERVICE

I am privileged to provide this wide range of complex and valuable services.

- REGULAR ONE-ON-ONE MEETINGS**
- QUALIFIED SUPPORT STAFF**
- INVESTMENT COMMENTARY**
- ONLINE ACCOUNT ACCESS**
- INVITATION TO SEMINARS & EVENTS**



JARED YORK, CFP

Jared began his financial planning career in 2009 and has continually upgraded his designations through the years.

As a Certified Financial Planner, Jared can provide the expertise and professional network to assist clients with all aspect of their wealth planning.

Exceptional client service is a priority for his team and selecting quality investments to support a long term plan is the main goal.

SPECIALIZED SERVICES



INVESTMENT PORTFOLIO DESIGN

Recommended solutions based on your individual investment profile, risk tolerance and future needs provide for a solid strategy that fits into your financial plan.



CONSOLIDATED INVESTMENT ASSETS

Consolidation provides a more complete picture of your financial situation, efficient tax reporting, and reduces fees on your assets.



DEBT MANAGEMENT

Solutions were designed to help you better manage and reduce your overall debt, saving you on interest costs.



MORTGAGE SERVICES

Referral to a mortgage specialist helped to secure a more attractive mortgage rate.



INSURANCE PLANNING

By putting a strategic insurance plan into place, the financial security of the people most important to you is now protected.



EDUCATION PLANNING

Helping to pay for post-secondary school can help give your child the advantage of graduating with minimal debt, or even debt-free.

REFERRALS ARE WELCOME

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