



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



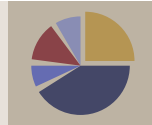
JARED YORK, CFP

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.

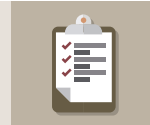
Exceptional client service is a priority for his team and selecting quality investments to support a long term plan is the main goal.

### 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.

Your Financial  
Planning Company

REFERRALS ARE WELCOME

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